About INPUT®

Market Intelligence and Strategic Planning Services

ABOUT INPUT

CLIENT LIST

INFORMATION SERVICES INDUSTRY STRUCTURE 1990

About INPUT

Company Profile

INPUT provides planning information, analysis, and recommendations to managers and executives in the information services industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software products, processing and network services, systems management, and systems/software maintenance and support).

Many of INPUT's professional staff have more than 20 years' experience in their areas of specialization. Most have held management positions in large organizations, enabling them to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Staff Credentials

INPUT's staff have been selected for their broad background in a variety of functions, including planning, marketing, operations, and information processing. Many of INPUT's professional staff have held executive positions in some of the world's leading organizations, both as vendors and users of information services, in areas such as the following:

- Processing Services
- Professional Services
- Turnkey Systems
- Applications Software
- Field (customer) Service
- Banking and Finance
- Insurance
- Process Manufacturing
- Telecommunications
- Federal Government

Educational backgrounds include both technical and business specializations, and many INPUT staff hold advanced degrees.

U.S. and European Advisory Services

INPUT offers the following advisory services on an annual subscription basis.

1. Market Analysis Program—U.S.
The Market Analysis Program provides up-to-date U.S. information services market analyses, five-year forecasts, trend analyses, vertical/cross-industry market reports, an on-site presentation, hotline inquiry service, and sound recommendations for action. It covers software products, turnkey systems, processing and network services, and

professional services markets. It is designed to satisfy the planning and marketing requirements of current and potential information services vendors.

2. Market Analysis Program—Europe
This program is designed to help vendors of software and services with their market planning. It examines the issues in the marketplace, from both a user and a vendor viewpoint. It provides detailed five-year market forecasts to help plan for future growth.

3. Vendor Analysis Program—U.S.
A comprehensive reference service covering more than 400 U.S. information services vendor organizations, VAP is often used for competitive analysis and prescreening of acquisition and joint-venture candidates. Profiles on leading vendors are updated regularly, and hotline inquiry service is provided.

4. Vendor Analysis Program—Europe
This is an invaluable service for gaining competitive information. Two binders are provided—one is a directory listing names, addresses, and turnover of some 700 European software and services vendors. The second binder contains profiles of about 300 key vendors.

5. Electronic Data Interchange Program
Focusing on what is fast becoming a major computer/communications market opportunity, this program keeps you well informed. Through monthly newsletters, timely news flashes, comprehensive studies, and telephone inquiry privileges, you will be informed and stay informed about the events and issues impacting this burgeoning market.

6. Network Services Program—Europe
Network services is a fast-growing area of the software and services industry. This program is essential to vendors of EDI, electronic information services, and network products and services. It keeps clients informed of the latest developments and includes a monthly newsletter on EDI.

7. Systems Integration Program—U.S.
Focus is on the fast-moving world of systems integration and the provision of complex information systems requiring vendor management and installation of multiple products and services. The program includes an annual market analysis of the U.S. systems integration market, SI vendor profiles and updates, topical market analysis reports, and an annual SI seminar.

8. Systems Operations Program—U.S.
This program focuses on the exciting resurgence of the market for outsourcing systems operations. It includes an annual market analysis report of the systems operations market, SO vendor profiles and updates, topical market analysis reports, and an annual SO seminar.

9. Systems Management Program—Europe
Systems integration and systems operations (facilities management) are key growth areas for the decade. This program examines these two areas and analyzes current market trends, user needs, and vendor offerings.

10. Federal Information Systems and Services Program
This program presents highly specific information on U.S. federal government procurement practices, identifies information services vendor opportunities, and provides guidance from INPUT's experienced Washington professionals to help clients maximize sales effectiveness in the federal government marketplace.

11. State Information Systems and Services Program (proposed)
This program presents extensive information on state government spending, procurement policies, identifies key contacts, opportunities, and provides guidance from INPUT's experienced professionals to help clients maximize sales opportunities in the state government marketplace.

12. Information Systems Program
ISP is designed for executives of large information systems organizations and provides crucial information for planning, procurement, and management decision making. This program is widely used by both user and vendor organizations.

13. Customer Service Program—International
This program provides customer service organization management with data and analyses needed for marketing, technical, financial, and organizational planning. The program pinpoints user perceptions of service received, presents vendor-by-vendor service comparisons, and analyzes and forecasts service markets for large systems, minicomputers, personal computer systems, and third-party maintenance. A monthly newsletter helps clients keep informed of the latest developments in the market.

14. Customer Service Program—Europe
Customer service is an expanding area. Companies are now expanding from hardware service to more software-related maintenance and professional services. This program helps vendors penetrate these new areas and provides guidelines for future market strategy. A monthly newsletter helps clients keep abreast of the latest developments in the market.

15. Worldwide Information Services Market Forecasts
In 1989 INPUT initiated this research study, which provides an international forecast for the information services market.

Customized Advisory Services

In addition to standard continuous-information programs, INPUT will work with you to develop and provide a customized advisory service that meets your unique requirements.

Acquisition Services

INPUT also offers acquisition services that are tailor-made for your requirements. INPUT's years of experience and data base of company information about information systems and services companies have helped many companies in their acquisition processes.

An Effective Combination

INPUT'S Executive Advisory Services are built on an effective combination of research-based studies, client meetings, informative conferences, and continuous client support. Each service is designed to deliver the information you need in the form most useful to you, the client. Executive Advisory Services are composed of *varied combinations of the following products and services:*

Research-Based Studies
Following a proven research methodology, INPUT conducts major research studies throughout each program year. Each year INPUT selects issues of concern to management. Topical reports are prepared and delivered throughout the calendar year.

Information Service Industry Reports
INPUT's Executive Advisory Services address specific issues, competitive environments, and user expenditures relative to:

Software Products	Professional Services
Processing Services	Turnkey Systems
Network Services	Small-Systems Service
Systems Integration	Third-Party Maintenance
Systems Operations	Large-Systems Service

Industry-Specific Market Reports
Detailed analyses of market trends, forces driving the markets, problems, opportunities, and user expenditures are available for the following sectors:

Discrete Manufacturing	Insurance
Process Manufacturing	Medical
Transportation	Education
Utilities	Business Services
Telecommunications	Consumer Services
Retail Distribution	Federal Government
Wholesale Distribution	State and Local Government
Banking and Finance	Miscellaneous Industries

Cross-Industry Market Report
A separate analysis covers the following cross-industry application areas:

Accounting	Office Systems
Education and Training	Planning and Analysis
Engineering and Scientific	Other Cross-Industry Sectors
Human Resources	

Hotline: Client Inquiry Services
Inquiries are answered quickly and completely through use of INPUT's Client Hotline. Clients may call any INPUT office (San Francisco, New York, Washington D.C., London, or Paris) during business hours or they may call a voicemail service to place questions after hours. This effective Hotline service is the cornerstone of every INPUT Executive Advisory Service.

The Information Center
One of the largest and most complete collections of information services industry data, the Information Center houses literally thousands of up-to-date files on vendors, industry markets, applications, current/emerging technologies, and more. Clients have complete access to the Information Center. In addition to the information contained in its files, the center maintains an 18-month inventory of over 130 major trade publications, vendor consultant manuals, economic data, government publications, and a variety of important industry documents.

Access to INPUT Professional Staff
Direct access to INPUT's staff, many of whom have more than 20 years of experience in the information industry, provides you with continuous research and planning support. When you buy INPUT, you buy experience and knowledge.

Client Conference
You can attend INPUT's Client Conference. This event addresses the status and future of the information services industry, the competitive environment, important industry trends potentially affecting your business, the impact of new technology and new service offerings, and more.

You will attend with top executives from many of the industry's leading, fastest-growing, and most successful vendor companies—and with top Information Systems (IS) managers from some of the world's most sophisticated user organizations.

On-Site Presentation by INPUT Executives
Many of INPUT's programs offer an informative presentation at your site. Covering the year's research, this session is scheduled at the convenience of the client.

Proprietary Research Service

INPUT conducts proprietary research that meets the unique requirements of an individual client. INPUT's custom research is effectively used:

For Business Planning
Planning for new products, planning for business startups, planning for expansion of an existing business or product line—each plan requires reliable information and analysis to support major decisions. INPUT's dedicated efforts and custom research expertise in business planning ensure comprehensive identification and analysis of the many factors affecting the final decision.

For Acquisition Planning
Successful acquisition and divestiture of information services companies requires reliable information. Through constant contact with information services vendor organizations and continuous tracking of company size, growth, financials, and management "chemistry," INPUT can provide the valuable insight and analysis you need to select the most suitable candidates.

For the Total Acquisition Process
INPUT has the credentials, the data base of company information, and—most importantly—the contacts to assist you with total acquisition and/or partnering relationship processes:

- Due Diligence
- Schedules and Introduction
- Criteria & Definitions
- Retainer and Fee-Based
- Active Search

For Competitive Analysis
Knowing marketing and sales tactics, product capabilities, strategic objectives, competitive postures, and strengths and weaknesses of your competition is as critical as knowing your own. The career experience of INPUT's professionals—coupled with INPUT's collection and maintenance of current financial, strategic, tactical, and operational information about more than 400 active companies—uniquely qualifies INPUT to provide the best competitive information available today.

For Market and Product Analysis
Developing new products and entering new markets involves considerable investment and risk. INPUT regularly conducts research for clients to identify product requirements, market dynamics, and market growth.

More About INPUT...

- More than 5,000 organizations, worldwide, have charted business directions based on INPUT's research and analysis.

- Many clients invest more than $50,000 each year to receive INPUT's recommendations and planning information.

- INPUT regularly conducts proprietary research for some of the largest companies in the world.

- INPUT has developed and maintains one of the most complete information industry libraries in the world (access is granted to all INPUT clients).

- INPUT clients control an estimated 70% of the total information industry market.

- INPUT analyses and forecasts are founded upon years of practical experience, knowledge of historical industry performance, continuous tracking of day-to-day industry events, knowledge of user and vendor plans, and business savvy.

- INPUT analysts accurately predicted the growth of the information services market—at a time when most research organizations deemed it a transient market. INPUT predicted the growth of the microcomputer market in 1980 and accurately forecasted its slowdown in 1984.

For More Information . . .

INPUT offers products and services that can improve productivity, and ultimately profit, in your firm. Please give us a call today. Our representatives will be happy to send you further information on INPUT services or to arrange a formal presentation at your offices.

For details on delivery schedules, client service entitlement, or Hotline support, simply call your nearest INPUT office. Our customer support group will be available to answer your questions.

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300 Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Boulevard
Teaneck, NJ 07666
Tel. (201) 801-0050 Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

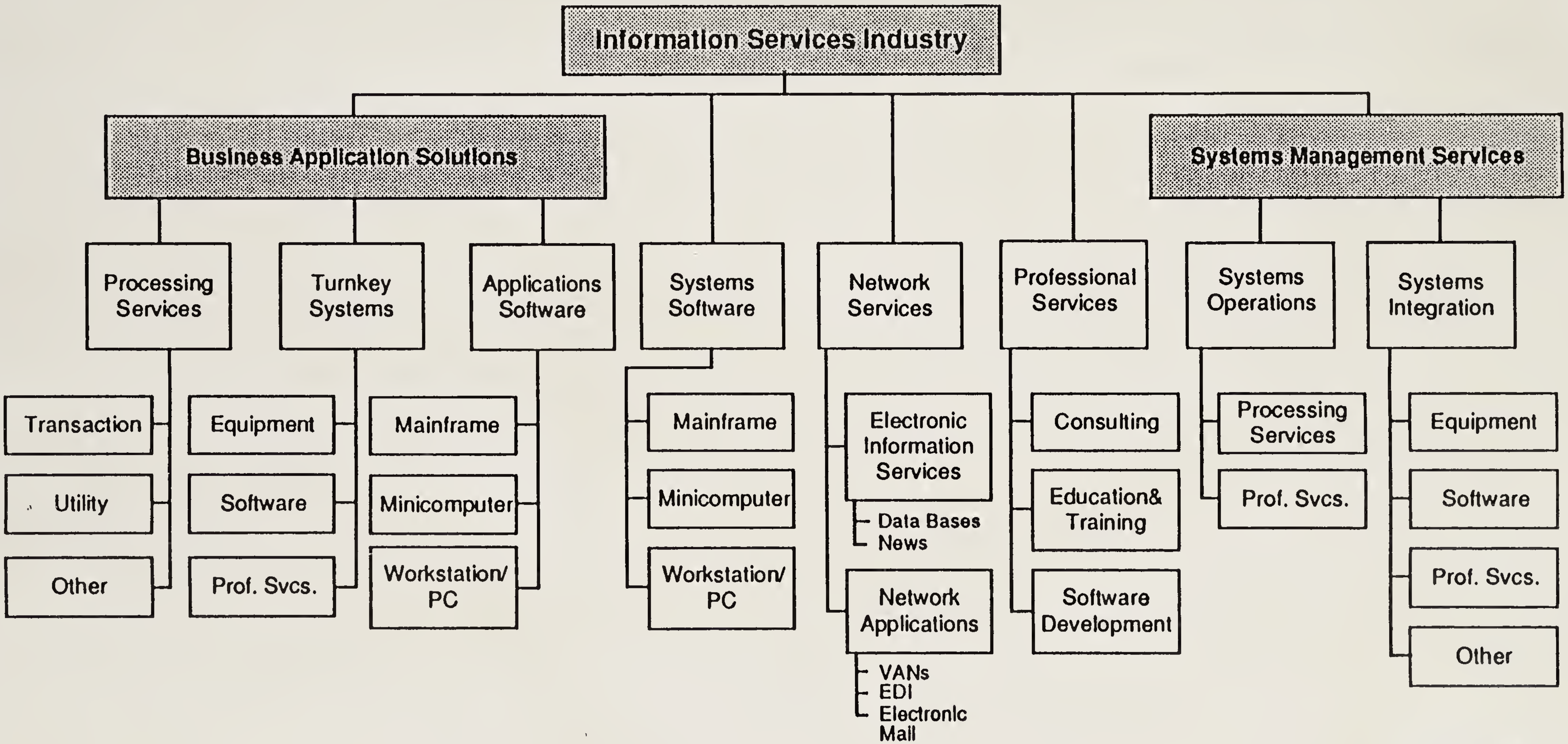
Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

INPUT®

Representative Corporate Client List

ADIA
Alliant
Amdahl Corporation
American Management Systems, Inc.
Ameritech Corporation
Andersen Consulting
Apple Computer, Inc.
Automated Sciences Group, Inc.
AT&T
BDM International, Inc.
Bechtel Corporation
Bell Atlantic
Bellsouth Corporation
Boeing Computer Services Company
British Telecom
Broadview Associates
Bull
CACI
CAP Gemini Sogeti
C.G.I.
Chartway Technologies
Cincinnati Bell
Commission of the European Communities
Computer Based Systems, Inc.
Computer Horizons
Computer Resource Management
Computer Sciences Corporation
Comsat Systems Division
Concurrent Computer
Concept Automation, Inc.
Contel Federal Systems
Dannet A/S
Data General
Digital Equipment Corporation
DNB Software
DTI
Eastman Kodak Company
ERC Government Systems
Ernst & Young
Federal Home Loan Bank
Finsiel Spa
FMC Corporation
France Telecom
General Electric Information Services Company
Granada Computer Services
Grumman Data Systems Corporation
GSI Corporation
GTE
Harris Government Systems
Hewlett-Packard Company
Hitachi
Hughes Aircraft Company
IBM Corporation
IDB for Northern Ireland
IMI Systems, Inc.
Information Associates, Inc.
Integrated Computer Systems
Intel Corporation
International Computers Limited (ICL)
Japan Information Processing Center
Kidder Peabody
Litton Computer Services
Lockheed Missiles & Space
Martin Marietta Data Systems
Maxima Corporation
McDonnell Douglas
McKinsey & Company
Micro-Computer Systems, Inc.
Moore Corporation
Motorola
MPACT EDI Systems, Inc.
National Systems and Research Company
NCR Corporation
NEC
Network Systems
Newbridge Networks, Inc.
Nippon Telegraph & Telephone
Nokia Data, Ltd.
Northern Telecom
Novacom
NTT America, Inc.
Nynex Corporation
Oracle Corporation
Pacific Telesis
Paxus Financial Systems Ltd.
Philips Information Systems
Price Waterhouse
Prime Computer
Raet NV
Rank Xerox
RJO Enterprises, Inc.
RMS Technologies
SAIC
Sanwa Bank, Ltd.
Science Council of Canada
SD Scicon
Sema Group plc.
Sligos
Software Engineering, Ltd.
Software Sciences, Ltd.
Softech, Inc.
Sterling Software, Inc.
ST Systems Corporation
STM Systems Corporation
Stratus Computer, Inc.
Sungard Data Systems
Sun Microsystems
Sybase
Systemhouse, Inc.
Systems Center, Inc.
Tandem Computer, Inc.
Technology Applications, Inc.
Texas Instruments
Thorn EMI plc.
TRW
Toshiba
Transpac/DC-DMVA
U.S. Sprint
U.S. West, Inc.
Unisys Corporation
University of California
Vanguard Information Center
Vitro Corporation
Welsh, Carson, Anderson & Stowe
Weyerhaeuser Information Systems

Information Services Industry Structure—1990



Source: INPUT

SPECIAL AUTHORIZATIONS

For Custom: Users - usually Will/D. Wayson
Instructions in folder next
to computer

Service Agreement

1991 INPUT SUBSCRIPTION SERVICES

Yes!
Please enter my order as described:

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Please invoice my company on purchase order number ______________ in the amount of $________________.

California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.
Travel expenses for on-site presentations are additional and will be billed separately.

INPUT
1280 Villa Street
Mountain View
CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

SEE TERMS ON OTHER SIDE

Accepted By INPUT:

Signature

Name

Title

Date

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TERM OF SUBSCRIPTION

The initial term of this subscription will be from January 1, 1991through December 31, 1991. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and its attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations, without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

Used by Nancy Hill - Take written copy to Andrea. She will do on Mac

Service Agreement

INPUT's 1991
U.S. Information Services Market Analysis Program

Yes!
Please enter my order as described:

Subscription to INPUT's customized U.S. Information Services Market Analysis Program (per attached) at the fee of

$____________________.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

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❑ Enclosed is my check in the amount of $____________________.

❑ Bill my company on purchase order number ______________ in the amount of $____________________.

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INPUT
1280 Villa Street
Mountain View
CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

cust MAMAP 1/91

PROGRAM PRICING/1991

1991 INPUT SERVICES SUMMARY
PRICES IN U.S. DOLLARS
December 27, 1990

OFFERING	FEE IF PAYMENT PRIOR TO 12/15/90	FEE IF PAYMENT AFTER 12/15/90
U.S. Information Services Industry Market Analysis Program	$29,500	$31,000
Worldwide Information Services Market Forecast		
- Fee as a subscriber to other INPUT Programs	5,000	5,000
- Fee as a nonsubscriber to other INPUT Programs	7,495	7,495
Information Systems Service	8,000	8,400
U.S. Vendor Analysis Program	10,500	11,000
Electronic Data & Information Interchange Program	12,000	12,500
U.S. Customer Service *Plus* Program	18,500	19,500
U.S. Systems Integration Program*	15,500	16,500
U.S. Systems Operations Program*	13,000	13,500
Systems Management Program - U.S.* Includes all deliverables from Systems Integration and Systems Operations	25,500	26,500
Federal Information Systems and Services Program	25,000	26,000
-- Market Analysis Service	15,000	15,000
-- Procurement Analysis Service	15,000	15,000
-- Automated Procurement Analysis Reports with the Federal Information Systems and Services Program or the Procurement Analysis Reports additional fee	2,000	2,000
State Government Information Systems and Services Program	9,500	11,500
Software and Services Market Analysis Programme--Europe	18,600	20,100
Software and Services Vendor Analysis Progamme--Europe	11,000	11,900
Network Services Market Analysis Programme--Europe	14,400	15,550
Systems Management Outsourcing Programme--Europe	19,950	21,400
Information Systems Customer Service Programme--Europe	27,500	29,300

Note: European Program fees based on $2.00 per Pound Sterling
Two copies of all deliverables included with each program subscription.
Added-site subscriptions, extra copy sets, and 1990 report list libraries available upon request; fees vary.

11/90-JParks/c:summary

1991 INPUT SERVICES SUMMARY
PRICES IN U.S. DOLLARS
December 27, 1990

OFFERING		FEE IF PAYMENT PRIOR TO 12/15/90	FEE IF PAYMENT AFTER 12/15/90
MAMAP	- U.S. Information Services Industry Market Analysis Program	$29,500	$31,000
WWMF	- Worldwide Information Services Market Forecast		
	- Fee as a subscriber to other INPUT Programs	5,000	5,000
	- Fee as a nonsubscriber to other INPUT Programs	7,495	7,495
UIISP	- Information Systems Program (**for Users**)	10,500	11,000
ISS	- Information Systems Service (**for Vendors**)	8,000	8,400
CVVAP	- U.S. Vendor Analysis Program	10,500	11,000
EDEDI	- Electronic Data & Information Interchange Program	12,000	12,500
FCCSP	- U.S. Customer Service *Plus* Program	18,500	19,500
SISIP	- U.S. Systems Integration Program*	15,500	16,500
SOSOP	- U.S. Systems Operations Program*	13,000	13,500
SMP/US	- Systems Management Program - U.S.* Includes all deliverables from Systems Integration and Systems Operations	25,500	26,500
FISSP	- Federal Information Systems and Services Program	25,000	26,000
	- Market Analysis Service	15,000	15,000
	- Procurement Analysis Service	15,000	15,000
	- Automated Procurement Analysis Reports <u>with</u> the Federal Information Systems and Services Program <u>or</u> the Procurement Analysis Reports additional fee	2,000	2,000
SGSGP	- State Government Information Systems and Services Program	9,500	11,500
MEMAP	- Software and Services Market Analysis Programme--Europe	18,600	20,100
VEVAP	- Software and Services Vendor Analysis Progamme--Europe	11,000	11,900
NENSP	- Network Services Market Analysis Programme--Europe	14,400	15,550
SESMP	- Systems Management Outsourcing Programme--Europe	19,950	21,400
CCESP	- Information Systems Customer Service Programme--Europe	27,500	29,300
	- Canadian Information Services Industry Market Forecast, 1990-1995 (Multiclient Study)	10,500	10,500

Note: European Program fees based on $2.00 per Pound Sterling
Two copies of all deliverables included with each program subscription.
Added-site subscriptions, extra copy sets, and 1990 report list libraries available upon request; fees vary.

11/90-JParks/c:internal

U.S. BROCHURES/1991

U.S. Information Services Market Analysis Program

INPUT®

INPUT's premier research service, providing an in-depth analysis and forecast of the U.S. information services markets.

WRITTEN ELEMENTS:

Market Analysis Reports	Forecasts of markets, vendor market shares, and industry trends in software products, processing, professional and network services, and turnkey systems markets.
Industry Sector Reports	Forecasts of markets and analysis of opportunities in 16 industry and 7 cross-industry sectors.
Market Forecast Book and Data Base	Annual forecasts for all market sectors in printed and diskette format, including systems integration and systems operations.
Research Bulletins	Frequent summaries of research projects, analyses of events and opinions on issues from experts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies and issues.

U.S. Information Services Market Analysis Program

INPUT®

BENEFITS
Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities. Support market strategy changes. A single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

The Market Analysis Program sits at the center of INPUT's analysis of the U.S. Information Services $100 billion market. The program provides the framework for all of INPUT's market analysis work and presents the subscriber with a full analysis of that market.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS
In-depth analysis and forecasts, 1991-1996, for the professional services, processing services, network services, systems software products, applications software products and turnkey systems market sectors.

INDUSTRY SECTOR REPORTS
Analysis and forecasts for 16 specific industry and 7 cross-industry markets.

Banking & Finance
Insurance
Medical/Health Care
Business Services
Education
Telecommunications
State & Local Govt.
Consumer Services

Discrete Manufacturing
Process Manufacturing
Retail Distribution
Wholesale Distribution
Utilities
Transportation
Federal Govt.
Misc. Industries

Accounting
Planning & Analysis
Office Systems
Other

Human Resources
Engineering & Scientific
Education & Training

MARKET FORECAST BOOK & DATA BASE
Published at year end as the annual summation of all INPUT market forecasts for the calendar year, including the systems integration and systems operations sectors.

RESEARCH BULLETINS
Concise summations of research in process, breaking industry trends and changes in the market. Published twice a month.

U.S. Information Services Market Analysis Program

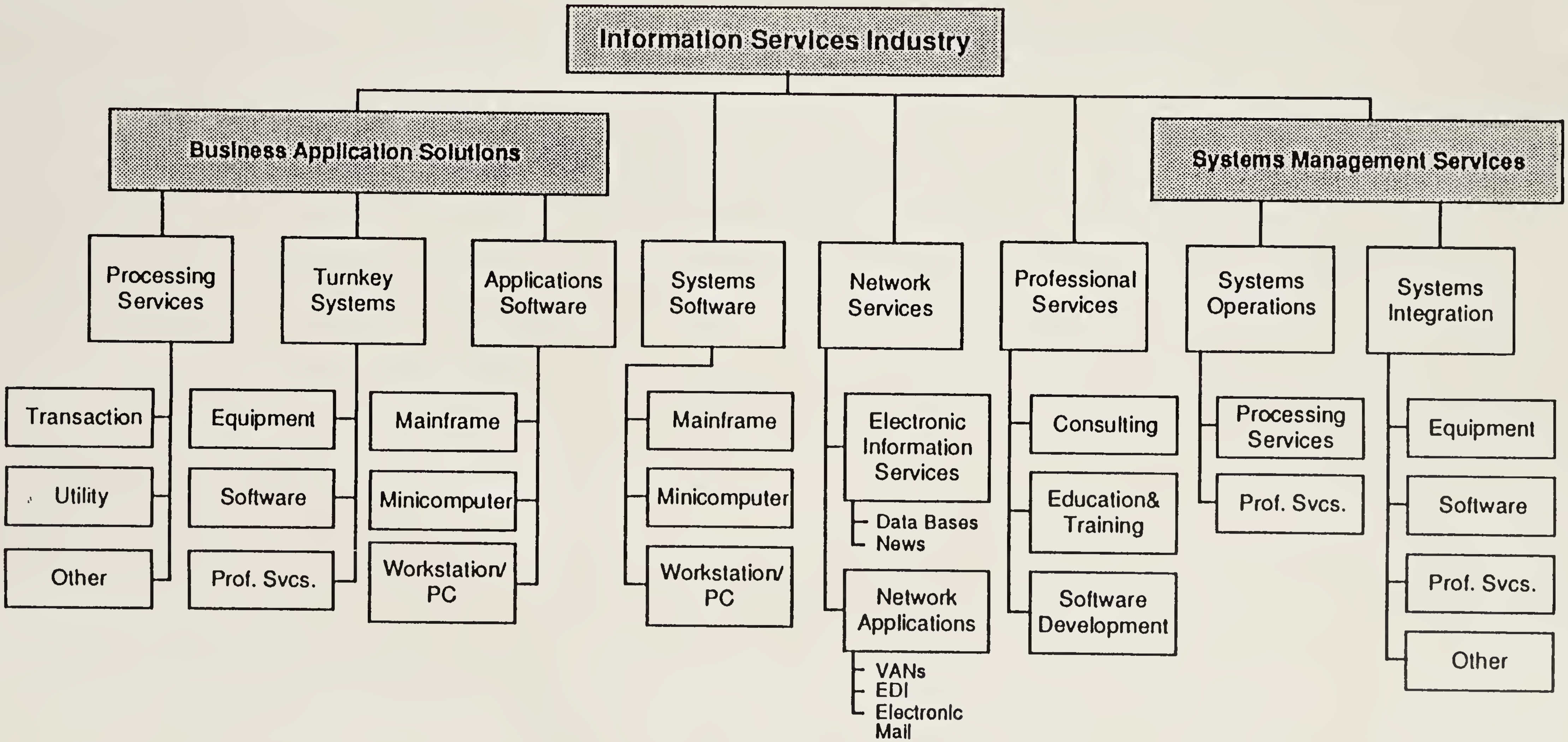
INPUT®

SERVICES

Telephone Inquiry	"Hotline" for short ad-hoc research needs on the U.S. Information Services market. Forty hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visits	Senior INPUT staff member presents research results at client's site.
Industry or Client Conference	Two seats at INPUT's annual assessment of the industry. Additional seats at two-thirds off the list price.
Information Center Access	Client may visit and use INPUT's research library.

Market Analysis Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

Information Services Industry Structure—1990



Source: INPUT

MAMAP-A-11/90

INPUT's 1991
U.S. Information Services Market Analysis Program

Yes!
Please enter my order as described:

Subscription to INPUT's U.S. Information Services Market Analysis Program at the fee of $31,000.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning _____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

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❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number ______________ in the amount of $________________.

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Connecticut clients: Please add 8% sales tax on total amount.

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INPUT
1280 Villa Street
Mountain View
CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

MAMAP 1/91

Worldwide Information Services Market Forecast

INPUT®

Track the growth of the worldwide information services markets by country and region. Available to INPUT program subscribers

WRITTEN ELEMENTS:

Worldwide Information Services Market Forecast includes:

Worldwide Coverage	Five geographical regions Over 30 country markets
Full Market Coverage	Eight service delivery modes

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies and issues.

INPUT's 1991
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U.S. Information Systems Program

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Assess requirements, and progress with deployment of information systems and services.

WRITTEN ELEMENTS:

Technology Implementation Reports	Analyses of implementation successes of new technologies.
Trend Analysis Reports	In-depth assessments of issues facing the information systems function.
Research Bulletins	Frequent summaries of research projects, and expert analyses of events and opinions on issues.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, and the telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

U.S. Information Systems Program

INPUT®

The Information Systems Program provides information systems executives and information services vendors with ongoing insight into critical challenges facing the information systems function: user requirements, analysis of technology implementation, assessment of tends impacting information systems.

BENEFITS

Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities, and support market strategy changes with this single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

PROGRAM DESCRIPTION

TECHNOLOGY IMPLEMENTATION REPORTS

Structured assessments of progress in the use of new technologies such as CASE, Executive Information Systems, and UNIX. Both user and vendor performance are analyzed.

TREND ANALYSIS REPORTS

Quantitative and qualitative assessments of such critical issues as downsizing, outsourcing, and managing technology. User requirements, management challenges, and recommendations for success are presented.

RESEARCH BULLETINS

Concise summations of research in process, breaking industry trends and changes in the information systems environment. Published monthly.

U.S. Information Systems Program

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PRELIMINARY REPORT DESCRIPTIONS (Preliminary List of Topics)

Buying Outside Services —A survey-based assessment of the manner in which the user (end user and information systems) are managing the process of buying software products services. This impacts outsourcing and a number of vendor issues.

Open Systems Strategies—A number of major systems vendors have adopted open systems strategies. What is the real acceptance in the traditional information systems arena?

Downsizing of Information Systems—An analysis of the impacts of decentralization, outsourcing, a move to cooperative and workstation-based applications, and tighter budgets on information systems programs—many of which are downsizing.

CASE—An updated look at CASE, the progress made in its use, and the progress made by the vendors. An update of the 1988 five-year forecast is included.

UNIX—The 1989 UNIX Software Products report is updated with new and increased user research, an assessment of the progress with open systems strategies of key computer systems vendors, and a new five-year forecast.

SERVICES

Telephone Inquiry	"Hotline" for short ad-hoc research needs on the U.S. Information Services market. Forty hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visit	Senior INPUT staff member presents research results at client's site.
Industry or Client Conference	Network with your peers and industry experts.
Information Center Access	Client may visit and use INPUT's research library.

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Information Systems Service

INPUT

INPUT's ongoing assessment of user requirements, and user progress with deployment of information systems and services.

WRITTEN ELEMENTS:

Trend Analysis Reports	In-depth assessments of issues facing the information systems function.
Technology Implementation Reports	Analyses of implementation successes of new technologies.
Research Bulletins	Frequent summaries of research projects, analyses of events, and opinions on issues from experts.

SERVICE ELEMENTS:

Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, and telephone.
Conference Attendance	Meeting of INPUT's clients and review of the state of the industry.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

Information Systems Service

INPUT®

The Information Systems Service provides information systems executives and information services vendors with ongoing insight into critical challenges facing the information systems function: user requirements, analysis of technology implementation, and assessment of trends impacting information systems.

BENEFITS

- Be aware of the trends when they first appear.
- Compare progress with that of other information systems organizations.
- Develop vendor marketing strategies.
- Organize information systems for success.

PROGRAM DESCRIPTION

TREND ANALYSIS REPORTS

Quantitative and qualitative assessments of such critical issues as downsizing, outsourcing, and managing technology. User requirements, management challenges, and recommendations for success are presented.

TECHNOLOGY IMPLEMENTATION REPORTS

Structured assessments of progress in the use of new technologies such as CASE, Executive Information Systems, and UNIX. Both user and vendor performance are analyzed.

PRELIMINARY REPORT DESCRIPTIONS (Preliminary List of Topics)

Buying Outside Services—A survey-based assessment of the manner in which the user (end user and information systems) are managing the process of buying software products services. This has impacts for outsourcing and for a number of vendor issues.

Open Systems Strategies—A number of major systems vendors have adopted open systems strategies. What is the real acceptance in the traditional information systems arena?

Downsizing of Information Systems —An analysis of the impacts of decentralization, outsourcing, a move to cooperative and workstation-based applications, and tighter budgets on information systems programs, many of which are downsizing.

Information Systems Service

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CASE—An updated look at CASE, the progress made in its use, and the progress made by the vendors. An update of the 1988 five-year forecast is included.

UNIX—The 1989 UNIX Software Products report is updated with new and increased user research and an assessment of the progress with ppen systems strategies of key computer systems vendors. A new five-year forecast is provided.

RESEARCH BULLETINS

Concise summations of research in process, breaking industry trends, and changes in the information systems environment. Published monthly.

SERVICES

Consultant Access	Ongoing interaction with INPUT's senior research staff.
Industry or Client Conference	Two seats at INPUT's annual assessment of the industry. Additional seats at two-thirds off the list price.
Information Center Access	Client may visit and use INPUT's research library.

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Information Services Vendor Analysis Program

INPUT®

Provides characteristics and descriptions of providers of information systems services and products, including private companies and hidden vendors such as divisions and units of computer, aerospace, and financial companies.

WRITTEN ELEMENTS:

Vendor Profiles	Descriptions of information services vendors, their products, strategies, and financial performance. Delivered monthly.
Vendor Directory	Listing of all vendors tracked by INPUT.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies and issues.

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U.S. Information Services Vendor Analysis Program

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Subject: EDI 1991 Program collateral

Please find attached copies of the latest version of the item mentioned above.

Be sure to throw away your old supply of this item.

Thank you.

INPUT®

U.S. Electronic Data & Information Interchange Program

Provides direction and analysis in the emerging area of electronic commerce, which is supported by the electronic interchange of data and information between independent organizations.

WRITTEN ELEMENTS:

Market Analysis Reports	Forecasts of markets, vendor market shares, and industry trends in electronic data interchange software products and information services
Electronic Commerce Sector Reports	Analysis of the use of electronic information interchange in sectors of the U.S. economy
Issue Studies	Targeted analyses of user requirements and market opportunities
Monthly Newsletter	Latest developments and key industry events

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, and telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organization, and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit INPUT's offices to review material on markets, companies, and issues.

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U.S. Electronic Data & Information Interchange Program

BENEFITS

Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities, and support market strategy changes with this single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

Focusing on the growing electronic interconnection of commerce within the U.S. and international markets, this program is designed to broaden understanding of shifts in the way business is conducted in the 1990s and the resulting opportunities for information services and software products.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

EDI U.S. Market Report, 1991-1996 —U.S. market forecasts, a chronology of EDI events over the past 12 months, a recap of standards issues, and a discussion of business opportunities and strategies that are enabled by EDI.

EDI International Markets, 1991-1996 —Market forecasts and analysis of the European, Pacific Rim, and other international markets for EDI software products and services.

ELECTRONIC COMMERCE SECTOR REPORTS

In-depth assessments of the use of electronic interchange of data and information in specific sectors of the U.S. economy. The reports for 1991 will address five of the following: grocery/food supply, healthcare/insurance, textiles/apparel, transportation/international trade, publishing/communications/education, oil/chemicals, or finance.

ISSUES STUDIES

Potentials of Electronic Commerce: A Guide for Users and Vendors—This report will build upon the 1989 report, *EDI Advanced Services,* and the 1990 report, *EDI Business Integration Issues*. It will examine uses of network technologies that facilitate commercial exchanges—including EDI, buy-sell bulletin boards, funds transfer networks, electronic ordering systems, market data bases, and others. The report examines the strategic aspects of scale, investment cost, standardization, and entry barriers associated with the implementation of large, transcorporate network infrastructures. The report will include assessments of new products and services, how they are being deployed, and what they mean for expansion of electronic information interchange between organizations.

Transborder Information Flow—As part of the international market analysis report, an assessment of the current legal and governmental controls and impacts on international information interchange will be provided. How is international trade being helped or hampered by international regulations?

INPUT®

U.S. Electronic Data & Information Interchange Program

EDI REPORTER

A monthly newsletter that summarizes recent research, reports industry events, profiles new products and services, and presents interviews with industry leaders.

SERVICES

Telephone Inquiry	"Hotline" for short ad-hoc research needs on the U.S. Information Services market. Forty hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visits	Senior INPUT staff member presents research results at client's site.
Industry or Client Conference	Network with your peers and industry experts.
Information Center Access	Client may visit and use INPUT's research library.

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U.S. Electronic Data & Information Interchange Program

Provides direction and analysis in the emerging markets of electronic data interchange and electronic information interchange.

WRITTEN ELEMENTS:

Issue Studies	Target analysis of user requirements and market opportunities.
Market Analysis Reports	Analysis and forecasts of U.S. and international markets.
Monthly Newsletter	Latest developments and key industry events.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
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Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities, and support market strategy changes with this single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

PROGRAM DESCRIPTION

ISSUE STUDIES

EDI/EII U.S. Market Report, 1991-1996—U.S. market forecasts, a chronology of EDI events over the past 12 months, a recap of standards issues, flow charts of typical uses of standards in vertical industries, and a discussion of business opportunities and strategies that are enabled by EDI.

EDI/EII International Markets, 1991-1996—European and Japanese market analyses, plus other Pacific Rim markets.

Interorganization Information—This report will build upon the 1989 report, Services EDI Advanced Services, and include EDI and EII services and products. The report will include descriptions of products and services, how they are being deployed, and what they mean for the expansion of electronic information interchange between organizations.

Transborder Information Flow—This report will provide an assessment of issues facing organizations using electronic information interchange on an electronic basis. Included will be an assessment of the legal constraints and their current impacts on the use of EDI and EII services, the impact of the 1992 changes in Europe, and more.

EDI & EII in Insurance and Health Care—An assessment of the use of EDI and EII services and products within the insurance and health care industries, and the impacts they have on these industries.

MARKET SECTOR REPORTS

In-depth analysis and forecasts for the Electronic Data and Electronic Information Interchange market sectors. Two reports are provided: U.S. Market and International Markets.

EDI REPORTER INTERNATIONAL

A monthly newsletter summarizing recent research, reporting industry events, profiling new products and services, and presenting interviews with industry leaders.

U.S. Electronic Data & Information Interchange Program

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SERVICES

Telephone Inquiry	"Hotline" for short ad-hoc research needs on the U.S. Information Services market. Forty hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visits	Senior INPUT staff member presents research results at client's site.
Industry or Client Conference	Network with your peers and industry experts.
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Title ______________________

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EDEDI 1/91

Customer Service *Plus* Program

INPUT

INPUT's Customer Service *Plus* Program addresses current customer service requirements and also examines nontraditional opportunities. Hence, Customer Service *Plus*.

WRITTEN ELEMENTS:

Issue Studies	Targeted areas of opportunity and analysis of critical issues.
Market Forecast	User expenditure five-year forecasts, issues, trends, and opportunities.
User Surveys	Customer satisfaction surveys: - Large-Scale - Midrange - PC/Workstation - TPM
Monthly Newsletters	Summaries of latest developments and hotline inquiries.
Research Bulletins	Frequent summaries of research projects, analyses of events, and opinions on issues from experts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain the opinion and advice of INPUT executives and consultants through meetings, mail, and telephone.
On-site Visit	Discuss your issues and concerns. Introduce experts to others in your organization and obtain presentations on the state of the industry.
Industry or Client Conference	Network with your peers and industry experts.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

Customer Service *Plus* Program

This program covers current customer service requirements and also provides an understanding of the potential opportunities open to customer service organizations. Hence, Customer Service *Plus.*

Customer Service *Plus* provides data, analyses, and recommendations needed for marketing, technical, financial, and organizational planning. It pinpoints user perceptions of service received and presents vendor-by-vendor service comparisons. Critical issues are discussed and service markets analyzed.

BENEFITS

- Serve your customers better by knowing their satisfaction levels with your service.
- React to your competition quickly through an awareness of their strengths and weaknesses.
- Expand your revenues by looking at new nontraditional service opportunities.
- Save your own and your staff's valuable time by utilizing INPUT's consultant access and hotline service.

PROGRAM DESCRIPTION

ISSUE STUDIES

- One-Stop Customer Support
- Impact of New Support Technologies
- Innovative Service Offerings
- Customer Service Partnerships

U.S. CUSTOMER SERVICE MARKET ANALYSIS REPORT

The report provides analyses and forecasts of user service expenditures by mainframe, midrange, and PC/workstation platform size, including TPM. Included in the report are ancillary services and nontraditional services offered by customer service organizations and by vendor type. Key customer service issues, trends, and opportunities are discussed.

Customer Service *Plus* Program

INPUT®

ISSUE REPORTS

One-Stop Customer Support—Vendors are beginning to offer a single point of contact for a wide variety of customer needs. Areas covered include hardware problem diagnosis and restoral, application usage queries, software modification and training. The single point of contact may deliver the actual services or serve as a transparent referral/contacting mechanism. The report distinguishes between the marketing aspects and the impact of one-stop support on customer-vendor business relationships.

Impact of New Support Technologies—This report examines technical innovations (implemented, planned, discussed) in customer service. The report will examine the technology involved and, equally importantly, will analyze the long-term business impact of these technical advances. Topics include: hardware-resident diagnostic software, help desk automation, problem/resolution data bases, and real-time software diagnostics.

Innovative Service Offerings—Most customer service organizations have stopped offering "plain vanilla" service. Some changes are changes in service packaging. Others represent significant moves into new offerings well outside of what has been considered customer services (e.g., network management, professional services). This report provides a snapshot of offerings by type of offering and by selected vendors, as well as an evaluation of successes, failures and overall trends.

Customer Service Partnerships—Fewer and fewer customer service organizations directly provide all of the services they sell to clients (and/or all of the services they provide). Such partnerships are common in other parts of the information technology business (e.g., VAR relationship or systems integration subcontracting). However, many customer service organizations are still uncertain on how to proceed. Included in this study is a description of selected current partnerships and issues and objectives in forming partnerships.

CUSTOMER SERVICE USER REQUIREMENTS REPORTS

Discusses customer satisfaction with vendor performance, including TPMs, user service, and support requirements:

- Large Systems User Requirements Report
- Midrange Systems User Requirements Report
- PC/Workstations User Requirements Report

SERVICE UPDATE

Monthly newsletter provides topical news about customer service in the United States and Europe (e.g., new vendor service policies, service offerings, vendor performance, and hotline summation).

Customer Service *Plus* Program

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RESEARCH BULLETINS

Concise summaries of research in progress, significant events, and other relevant issues.

SERVICES

Telephone Inquiry	"Hotline" inquiry for short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data. Forty hours of hotline service are provided each year.
Consultant Access	Continuous support from consultants and executives including reactions to events, opinions, and ideas.
On-Site Visit	An INPUT consultant presents research results and industry forecasts at your site and relates this to your specific service markets. Your issues and concerns are discussed together with industry trends. (Travel expenses are additional.)
Industry or Client Conference	Attend INPUT's assessment of the information services industry at two-thirds the list registration fee.
Information Center Access	Client may visit and use INPUT's research library.

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U.S. Systems Integration Program

INPUT®

Research and analysis of the market for systems integration in information systems, networking, and automation.

WRITTEN ELEMENTS:

Market Analysis	Analysis of SI issues and trends and five-year market focus
Vendor Profiles	Descriptions of SI vendors, their characteristics, strengths and weaknesses
Topical Reports	Systems integration technology trends
	Subcontracting to client integrators
	Systems management directions and priorities
Research Bulletins	Frequent (every two weeks on the average) summaries of research projects, analysis of events, and opinions on issues from experts
SI Data Base	Access to a data base of SI contracts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions
Consultant Access	Obtain the opinions and advice of INPUT executives and consultants through meetings, mail and telephone
On-Site Visit	Discuss your issues and concerns. Receive INPUT's expert opinions through tailored presentations
Industry or Client Conference	Network with users and vendors at annual conference

U.S. Systems Integration Program

INPUT®

This program provides research and analysis of the trends and issues in the rapidly growing systems integration (SI) market. It addresses the market for vendor-provided management and implementation of solutions to complex information processing and communications problems.

BENEFITS

Strategic Planning Support	Comprehensive market research and vendor analysis are fundamental to strategic planning.
Tactical Decision Support	Research on hot market issues and events, and the SI data base, aid in resource allocation and marketing decisions.
Consulting Support	The "hotline" and access to INPUT's consultants allow you to test your ideas.
Networking	The conference provides an opportunity to establish relationships with other SI vendors.
Marketing	INPUT's familiarity with your company will promote your capabilities.

PROGRAM DESCRIPTION

REPORTS

Systems Integration Market Analysis—Examines SI issues and trends in the U.S. domestic market. SI user expenditures are forecast for the next five years by vertical industry, and marketing strategies and recommendations are included.

Systems Integration Vendor Analysis—Includes detailed profiles of the major SI vendors including organization, capabilities, business results, strategies, market focus, alliances, and INPUT's assessment of strengths and weaknesses.

Systems Integration Technology Trends—Examines technologies currently being implemented in SI programs and projects and examines those users will seek over the next five years.

Subcontracting to Client Integrators—Focuses on the SI opportunities in the secondary SI market of user-managed projects. Includes a five-year forecast of user expenditures and recommendations for participation in this market segment.

Systems Management Direction and Priorities—This report examines the major factors that are causing the accelerated acceptance of systems integration and systems operations. It identifies the systems management trends that can be anticipated in the decade ahead.

Systems Integration Data Base—Reports from INPUT's SI project data base of important projects are published periodically.

U.S. Systems Integration Program

INPUT®

RESEARCH BULLETINS

Frequently published reports on INPUT's research findings and important industry events and trends.

CONFERENCE

Subscribers attend this annual conference which provides an update on INPUT's annual research and includes guest/user speakers who present their experiences and views of systems integration.

SERVICES

Telephone Inquiry	Satisfies client requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Consultant Access	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
On-Site Visit	An INPUT consultant presents annual research at your site that is tailored to meet your executives' needs.
Information Center Access	INPUT"s libraries in California, New Jersey, and Virginia are available for client research.

ADDITIONAL SERVICES

European Systems Management Program	A companion program, authored in INPUT's London office, addresses the SI market in Western Europe.
Site Subscriptions	Complete program services to additional sites at a substantially reduced fee.
Custom Research and Consulting	INPUT analyzes market opportunities, user needs, competitive environment, acquisition targets, etc. based on your unique needs and drawing on INPUT's existing research.
Consultant Presentations	INPUT'S consultants are available to make presentations, planning meetings, user groups, or other functions.

Systems Integration Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

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U.S. Systems Operations Program

INPUT®

Analyzes the "outsourcing" of systems operations—the revolution in the IS market in the 1990s.

WRITTEN ELEMENTS

Market Analysis	Analysis of SO issues and trends, and five-year market forecasts for applications and platform systems operations.
Vendor Profiles	Descriptions of SO vendors, their characteristics, strengths and weaknesses.
Topical Reports	Systems operations buyer values and alternatives.
	Systems management directions and priorities
Research Bulletins	Frequent (every two weeks on the average) summaries of SO research projects, analysis of events and opinions on issues from experts.
SO Data Base	Access to a data base of SO contracts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain the opinions and advice of INPUT executives and consultants through meetings mail and telephone.
On-Site Visits	Discuss your issues and concerns. Receive INPUT's expert opinions through tailored presentations.
Client Conference	Network with users and vendors at annual conference
Information Center Access	Visit our offices to review material on markets, companies, and issues.

U.S. Systems Operations Program

INPUT®

This program provides research and analysis of the trends and issues in the rapidly growing systems operations (SO) market. It addresses the market for vendor management and operations of the majority of clients' information processing activities under a long-term contract.

BENEFITS

Strategic Planning Support	Comprehensive market research and vendor analysis are fundamental to strategic planning.
Tactical Decision Support	Research on "hot" market issues and events, and the SO data base, aid in resource allocation and marketing decisions.
Consulting Support	The "hotline" and access to INPUT's consultants allow you to test your ideas.
Networking	The conference provides an opportunity to establish relationships with other SO vendors.
Marketing	INPUT's familiarity with your company will promote your capabilities.

PROGRAM DESCRIPTION

REPORTS

Systems Operations Market Analysis—Examines SO issues, trends, and marketing strategies in the U.S. domestic market, including a forecast of SO user expenditures by vertical industry for the next five years.

Systems Operations Vendor Analysis—Detailed profiles of major SO vendors: organization, capabilities, business results, strategies, market focus, alliances, and INPUT's assessment of strengths and weaknesses.

Systems Operations Buyers Values and Alternatives—Examines the driving forces and major issues facing the information systems function. Looks in-depth at the considerations involved in employing a systems operations firm from the corporate, information systems and end user perspectives.

Systems Management Direction and Priorities—Examines major factors causing accelerated acceptance of systems integration and systems operations. Identifies the systems management trends that can be anticipated in the decade ahead.

Systems Operations Data Base—Reports from INPUT's SO project data base of important projects are published periodically.

U.S. Systems Operations Program

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RESEARCH BULLETINS

Frequently published reports on INPUT's research findings and important industry events and trends.

CONFERENCE

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SERVICES

Telephone Inquiry	Satisfies client requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Access to INPUT Consultants	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
On-Site Visit	An INPUT consultant presents annual research at your site that is tailored to meet executives' needs.
Information Center Access	INPUT libraries in California, Virginia, and New Jersey are available for client research.

ADDITIONAL SERVICES

European Systems Management Program	A companion program, authored in INPUT's London office, addresses the SO market in Western Europe.
Site Subscriptions	Complete program services to additional sites at a substantially reduced fee.
Custom Research and Consulting	INPUT analyzes market opportunities, user needs, competitive environment, acquisition targets, etc. based on your unique needs and drawing on INPUT's existing research.
Consultant Presentations	INPUT's consultants are available to make presentations, planning meetings, user groups, or other functions.

Systems Operations Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

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State Government Information Systems and Services Program

Provides state government agency procurement data as well as analysis of agency information on markets, procurement regulations, technology trends, buying values and opportunities.

WRITTEN ELEMENTS:

State Agency Profiles	Descriptions of needs, issues, requirements, policies and spending patterns, with key contacts and decision makers.
Market Analysis/Forecast	Analysis of major issues, trends, vendors and five-year forecast.
Issue Analyses	Issue and topic analyses on key subjects affecting product or market strategy as indicated by clients.
Opportunity Bulletins	Identification and description of each opportunity with up-to-date status available by "hotline."

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT's executives and consultants from meetings, mail, and telephone.
Client Conference	Covers INPUT's research and forecasts, presentations by agency and industry leaders, and network opportunities.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

RESEARCH PANEL

Participate confidentially in agency IS issues panel to obtain evaluation, needs, and comparisons.

State Government Information Systems and Services Program

INPUT®

Provides answers about trends and market opportunities in states throughout the U.S. Program information includes comprehensive spending patterns, decision makers, buying values, and opportunities.

BENEFITS

INPUT's State Government Program will help you:

- Capture new state market opportunities
- Understand the impact of market changes
- Support state government market strategy
- Be aware of key trends and issues
- Understand individual agency needs and policies

PROGRAM DESCRIPTION

STATE AGENCY SERVICE PROFILES

Comprehensive profiles of information systems needs, requirements, issues, trends, policies, and spending patterns of major state agencies and departments. Each profile identifies key decision makers, information systems procurement policies, and key contracts.

MARKET ANALYSIS/FORECAST SERIES

An ongoing series of analyses, beginning with a review of the industry the previous year. Analyses performed and delivered throughout the year will include major issues, trends, leading vendors, and a comprehensive annual forecast for the coming five years. Each report will be updated annually, to ensure year-to-year comparison and comprehensive, up-to-date data.

ISSUE ANALYSIS

Issue and topic analysis reports will be prepared on subjects that clients indicate are of key interest. Each report will deal with a single topic or issue that could affect an organization's products or market strategy. Issues could include the impact of federal budget reduction on federally funded projects or whether states will adopt the federal telecommunication standards.

OPPORTUNITY BULLETINS

Opportunity bulletins will be prepared for each opportunity identified during the course of research about state agencies. Once identified, information about the status of the opportunity will be available to clients through INPUT's hotline support service. Opportunity bulletins will be released as they are identified.

State Government Information Systems and Services Program

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SERVICES

Telephone Inquiry	The "hotline" inquiry service provides fullfilment of short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.
Consultant Access	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
State Systems and Services Conference	Two-day conference covers INPUT's state market research. Expenditure forecasts are presented together with presentations by state government and industry leaders on trends, policies, and methods.
Information Center Access	Clients have access to INPUT's information centers which provide extensive information about opportunities and about companies providing services to state governments.

State Government Information Systems and Services Program is available from INPUT, 1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
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INPUT®

Software and Services Market Analysis Programme—Europe

Provides reliable information on European software and services markets to enable executives and managers to plan effective marketing strategies for the future.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES:

Market Reports	Analysis and forecasts of user expenditures in European software and services markets.
Industry Sector Reports	Examination of issues, trends and opportunities in software and services in the most important industry sectors.
Topic Reports	Research on critical issues in the software and services market.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as reactions to events, opinions and ideas.
On-Site Visit	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

INPUT®

Software and Services Market Analysis Programme—Europe

INPUT's Market Analysis Programme provides you with detailed information so that you can make informed decisions about your company's future strategy.

An annual subscription answers many of the information needs of company executives in the software and services industry. INPUT has been active in Europe for nearly ten years and has built—and is constantly updating—a large database of industry and user information.

BENEFITS

The need for accurate market information

Executives need a regular source of reliable information, structured in such a way that it can be applied directly to their own businesses. INPUT's Market Analysis Programme can provide this information to help executives plan for the future direction of their companies.

One of the major strengths of INPUT's research programmes is the European coverage. Clients will be able to find out how markets are developing in each European country as well as gain a valuable insight into the overall European market—essential knowledge for conducting business in the 1990s.

Clients can learn:

- Where the best opportunities are for their products and services
- Competitive information
- Market size and growth rates
- Driving and inhibiting forces
- Issues and trends
- Emerging opportunity areas

All of these enable the client to focus sales and marketing efforts.

The European software and services industry is a rapidly changing, fiercely competitive and complex environment. In order to succeed in such a market, executives are under increasing pressure to have detailed information about their companies' target markets. With over 30,000 companies participating in the European software and services market, serving many industry sectors and delivering many different products and services, this is a difficult and time-consuming task. INPUT can help make this task easier and therefore less costly.

INPUT®

Software and Services Market Analysis Programme—Europe

PROGRAMME DESCRIPTION

MARKET SECTOR REPORTS

The Western European Market for Computer Software and Services, 1991-1996—This report summarises the market forecasts for the software and services sector, including: applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration. It provides market sizes for 1990, with forecasts for 1991-1996, and also provides a country breakdown of the market. Each delivery mode is segmented into subsectors.

Processing Services Opportunities—Western Europe, 1991-1996—There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors to understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities—Western Europe, 1991-1996 —This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their strengths and weaknesses. The report identifies leading vendors, providing valuable competitive information.

European Software Applications Solutions Opportunities, 1991-1996—This report forecasts the size of the applications solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It discusses market issues, such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

Systems Software Products—Western Europe, 1991-1996—This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends such as the move towards distributed processing and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

INPUT®

Software and Services Market Analysis Programme—Europe

INDUSTRY SECTOR REPORTS

European Software and Services Market, 1991-1996 —Insurance Sector—In the insurance sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces in the market for software and services in this sector. Software and services vendors in this sector can gain an accurate overview of the European market for their services in the insurance sector.

European Software and Services Market, 1991-1996—Banking and Finance Sector—INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report contains detailed market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

European Software and Services Market, 1991-1996—Discrete Manufacturing Sector—INPUT's discrete manufacturing sector report evaluates the impact of trends in this sector on the software and services market. Software and services vendors active in the manufacturing sector will find that this report provides them with detailed market forecasts, identifies the leading vendors and the key opportunities available. The report can make a valuable contribution to vendor companies' strategic planning.

European Software and Services Market, 1991-1996— Process Manufacturing Sector—This companion volume examines the issues and trends in the process manufacturing sector and assesses their impacts on the software and service market. The report will help vendor companies, and those considering entering the market, to plan their future strategies by providing detailed five-year market forecasts and identifying the key opportunities available.

European Software and Services Market, 1991-1996—Retail and Wholesale Distribution Sector—This report analyses the market for software and services in the distribution industries of Western Europe. Software and services vendors can find out what the major trends, issues and opportunities are, and are provided with market forecasts for wholesale and retail activities in France, Germany, Spain, the U.K. and the rest of Europe.

Software and Services Market Analysis Programme—Europe

INPUT®

TOPIC REPORTS

Education and Training—This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services to assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Software Applications Maintenance—This report examines the specific area of user-written software applications maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities—UNIX has become an important operating system as suppliers move away from their own proprietary systems. This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues—As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them quickly to acquire market penetration into new countries, or to able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity.

RESEARCH BULLETINS

Research bulletins, produced during each project, alert you as quickly as possible to the results of INPUT's research studies. Research bulletins communicate key findings concerning issues, trends, new market developments and market analysis and forecasts.

INPUT®

Software and Services Market Analysis Programme—Europe

SERVICES

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- Information on competitors (brochures, revenues, subsidiaries)
- Lists of companies in a particular country offering CASE tools
- What factors influence the choice of location of an IS company's headquarters?
- What effect will the merger between company x and y have on my business?

Consulting Support

INPUT's experienced consultants are always available to give opinions, reactions to events, and for ideas.

On-Site Visit

INPUT consultants can present and discuss research findings at the client's site, so that the client can relate the research results to his own circumstances. The client can raise specific issues and interests in complete confidence, away from competitors.

Client Meetings

Meetings, held regularly throughout the year in various European locations, enable INPUT's clients to meet each other and INPUT's professional consultants. At the meetings, research projects are reviewed and market trends and issues are discussed. The format of these meetings (typically 15-20 client participants) and their focus on one or two key areas allow in-depth discussion and full client involvement.

Market Analysis Programme—Europe is available from INPUT, 1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300. Detailed description of services and fees also available upon request from INPUT's offices in New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

Service Agreement

INPUT's 1991
Software and Services Market Analysis Program—Europe

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Subscription to INPUT's Software and Services Market Analysis Program—Europe at the fee of $20,100*.

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*Price quoted is U.S. dollar equivalent to pounds sterling

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Network Services Market Analysis Programme—Europe

Provides market size data, analysis of issues and trends and identification of new opportunities in EDI, electronic messaging, network management and other network-based services.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES:

Market Report	Analysis and forecast of user expenditure in the European network services market.
Topic Reports	Examination of issues, trends and opportunities in specific sectors of the network services market.
User Issues Report	Analysis of the network service market from the users' viewpoints.
Vendor Report	Profiles of European network services suppliers and their market positions.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as reactions to events, opinions and ideas.
On-Site Visits	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Presentations and discussion of research results.

Network Services Market Analysis Programme—Europe

INPUT®

An annual subscription to INPUT's network services programme provides executives and managers with the data and analysis they need to plan future directions for their companies. The research programme examines topical issues, such as deregulation of telecommunications carriage in Europe, and also highlights opportunities for vendors in new, emerging areas.

Five-year market forecasts are provided, together with discussion of issues and trends in the market and differences among European countries.

BENEFITS

Clients of INPUT's Network Services Market Analysis Programme can find out about trends and developments across Europe in this specialised sector of the software and services market.

This market is changing rapidly, as new trends emerge and businesses place even greater reliance on their computer systems and the communication links between them. To be at the forefront of this fast-moving market requires detailed knowledge of market sizes, specific opportunity areas and country market differences. An annual subscription to INPUT's Network Services Market Analysis Programme provides executives in the network services industry with the data and analysis needed to make informed, strategic decisions.

Information such as the following enables executives to plan marketing strategies to boost sales revenues:

- Competitive information
- Market size and growth rates
- Driving and inhibiting forces in the market
- Emerging opportunity areas

INPUT's carefully constructed research programme provides a mix of written documents, presentations, meetings and telephone support, so that you can, in effect, extend your marketing department.

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Network Services Market Analysis Programme—Europe

PROGRAMME DESCRIPTION

MARKET REPORT

The Western European Market for Network Services, 1991-1996—This report provides an analysis and forecast for the network services sector of the European network services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures as well as market share analysis and identification of leading vendors.

TOPIC REPORTS

Western European EDI Developments, 1991-1996—This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors and identifies the challenges that vendors are likely to face over the next five years, such as the need to be able to offer an EDI service which handles all classes of networks on an end-to-end basis.

Financial Network Services—Western Europe, 1991-1996—This report examines the new opportunities that will result from the proposed deregulation of telecommunications carriage. The market is becoming more competitive as a result of new players entering the market, so it is even more important for vendors to be knowledgeable. This report provides a complete overview of the current market environment and can make a valuable contribution to strategic planning activities.

Opportunities in ISDN and Other Emerging Technologies in Western Europe, 1991-1996—Continuing developments of telecommunications technology will open up new service opportunities for network services vendors in an increasingly competitive environment. However, user inertia and the complexities of network use present very real difficulties for both users and vendors in fulfilling their potential. This report explores the dynamics of this situation and provides insight into the most profitable market opportunities and the ways they can be exploited.

USER ISSUES REPORT

User Issues in Network Services Markets—Western Europe, 1991-1996—This report examines the network services market from a user viewpoint. It discusses the issues that concern users and analyses their requirements for network services over the next five years. As networks are playing a more critical role in users' information systems, users' demands and expectations are increasing. It is vital for suppliers of network services to understand the changes that are taking place in the market.

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Network Services Market Analysis Programme—Europe

VENDOR REPORT

Western European Network Service Provider Profiles—This report contains profiles of leading European network service providers. The profiles provide vendors with valuable, strategic information on their competitors by describing each company's products and services, listing geographic markets served and giving a history of merger and acquisition activity. The profiles also give a five-year financial analysis of each company's revenues and a description of the company's business strategy.

RESEARCH BULLETINS

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SERVICES

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Client Meetings	Meetings, held regularly throughout the year in various European locations, enable INPUT clients to meet each other and INPUT's professional consultants. At the meetings, research projects are reviewed and market trends and issues are discussed. The format of these meetings (typically 15-20 client participants) and their focus on one or two key areas allow in-depth discussion and full client involvement.

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1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in
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INPUT's 1991
Software and Services Vendor Analysis Program—Europe

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TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

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Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

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Systems Management Outsourcing Programme—Europe

INPUT®

Provides information on European systems integration and systems operations markets.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Systems Integration Reports	Market forecasts, vendor strategies, marketing and user-related issues and specific technology opportunities for the European systems integration market.
Systems Operations Reports	Market forecasts, vendor strategies, marketing and user-related issues and specific technology opportunities for the European systems operations market.
Research Bulletins	Issued on research in progress.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as consultant's reactions to events, opinions and ideas.
On-Site Visits	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

Systems Management Outsourcing Programme—Europe

INPUT®

SOFTWARE AND SERVICES MARKETS

An annual subscription to INPUT's Systems Management Programme of research enables executives and managers involved in marketing their companies' systems integration and systems operations (facilities management) capability to be well-informed about the trends in the industry. Vendors need to be aware of what the user issues are, and need to have a thorough knowledge of what the competition offers.

BENEFITS

INPUT's programme of research examines the two related areas of systems integration and systems operations. Although these two markets are relatively small, they are among the fastest growing in the software and services industry. It is especially important to find a reliable source of data about these markets. INPUT's Systems Management Programme clients benefit from INPUT's expertise in this specialised market sector. Clients of the programme can find out:

- How vendors are structuring to be best placed to win systems integration contracts
- How vendors are responding to the need to provide a more complete service
- The effect of skills shortages and new technologies
- What criteria users employ to select a vendor
- Vendor market share
- Market size and growth rates

The research provides systems integration vendors with advice and recommendations on how to be successful in these markets, covering issues such as risk assessment and management, alliances and partnerships. It also provides detailed market forecasts by European country and by industry sector.

The 1990s will see an increase in the requirement for systems integration and systems operations, and INPUT's Systems Management Programme will ensure that vendor companies are equipped to compete successfully in this market.

Systems Management Outsourcing Programme—Europe

INPUT®

PROGRAMME DESCRIPTION

SYSTEMS INTEGRATION REPORTS

Systems Integration Market Analysis and Forecast—Western Europe, 1991-1996—This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. The report provides valuable insight into the current market environment and can assist companies with their strategic planning activities.

Vendor Alliances and Strategies in Western European Systems Integration Markets, 1991-1996—This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. Bidding for systems integration contracts carries a potentially high risk factor, and the report examines vendor strategies for reducing this risk. It also discusses how vendors are forming alliances to gain the necessary expertise to bid successfully.

Marketing Issues in Systems Integration Markets—Western Europe, 1991-1996—This report examines the systems integration market from a user's viewpoint, to enable companies operating in systems integration markets to better understand client requirements. The report investigates the major issues in industry markets that are leading users towards systems integration contracts, and examines user issues and concerns about selecting a vendor.

Imaging Opportunities in Western European Systems Integration Markets, 1991-1996—This report examines opportunities in this exciting, emerging technology. Now that pictures, photographs and film can be stored electronically, a plethora of opportunities is arising for integrating such technology into users' information systems. Computerised personnel records can contain photographs and banks can store copies of cheques. This report sizes the market for imaging systems and identifies leading vendors active in the market, providing valuable competitive information for companies involved in, or considering entering, the market.

Systems Management Outsourcing Programme—Europe

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SYSTEMS OPERATIONS REPORTS

Systems Operations Market Analysis and Forecast—Western Europe, 1991-1996—This report examines the demand and market forces in each European country market. Leading vendors are listed and their market shares identified. The report also examines the impact of systems operations on other markets in the software and services industry. The report provides valuable market size data and competitive information for European companies involved in, or considering entering, the systems operations market.

Vendor Alliances and Strategies in Western European Systems Operations Markets, 1991-1996—This report examines the trends affecting systems operations markets from a vendor point of view. It discusses the main issues of bidding for, and managing, systems operations contracts, and identifies the necessary vendor skills. This report is of value to companies already active in the market, and can also assist those outside the market to understand the effect of trends on their own activities.

Marketing Issues in Western European Systems Operations Markets, 1991-1996—This report identifies user attitudes, and assesses their significance for systems operations vendors. The report examines, from a user's point of view, the main issues in contracting out the operations of an information system. The report analyses these user attitudes, and systems operations vendors can benefit from INPUT's recommendations for vendor marketing strategies.

Network Management in Systems Operations Markets—Western Europe, 1991-1996—Computer systems today increasingly involve some networking capability. This presents particular niche opportunities for systems operations vendors to manage the network on behalf of the user. This report examines the opportunities available in this market, discusses user requirements for network management and assesses the skills that vendors need to be able to offer in order to enter the market.

RESEARCH BULLETINS

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Systems Management Outsourcing Programme—Europe

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SERVICES

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- Which are the fastest growing country markets?
- Who are the top five systems integrators in Finland?
- What are the key forces driving the systems integration market in Spain?

Consulting Support

INPUT's experienced consultants are always available to give opinions and reactions to events, and for ideas.

On-Site Visits

INPUT consultants can present and discuss research findings at the client's site, so that the client can relate the research results to his own circumstances. The client can raise specific issues and interests in complete confidence, away from competitors.

Client Meetings

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Customer Service Programme—Europe

INPUT®

Provides data, analyses and strategic intelligence on customer services issues and markets. It particularly focuses on rapidly developing new service opportunities for customer services organisations.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES

Market Analysis Reports	Analysis and forecast of user expenditures across the European customer service and independent maintenance markets.
User Trends and Issues Reports	Examination of user issues and trends and levels of satisfaction with customer service.
Professional Services Reports	Discussion and analysis of important opportunities for customer services vendors, such as systems operations, consulting, systems integration and disaster recovery.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as consultant's reactions to events, opinions and ideas.
On-Site Visit	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

Customer Service Programme—Europe

INPUT

INPUT has been tracking the customer service market in Europe since 1979. Through constant contact with vendors and users, INPUT is able to help customer service executives decide upon the future directions that their customer service organisations should take.

INPUT researches the customer service market annually and provides information on hardware and software maintenance and also focuses on nonmaintenance business activities, such as professional services.

BENEFITS

Subscription to INPUT's Customer Service Programme provides clients with timely information about customer service markets to enable executives to plan effective marketing strategies for the future.

INPUT can help clients:

Size the market

- Target high-growth sectors
- Identify competitors
- Position their organisations against the competition
- Find out how satisfied their clients are with the service you provided
- Formulate effective pricing strategies

THE CHANGING ROLE OF THE CUSTOMER SERVICE DEPARTMENT

Customer service departments can no longer afford to rely on equipment maintenance revenues alone as this revenue stream slows. New revenue-generating businesses must be developed out of the growing needs of users for fuller system support services.

To restructure a large customer service organisation, to enable it to branch out into nontraditional maintenance businesses, is no easy task. Customer service executives need to identify alternative markets and need to consider the implications of entering these markets, for example:

- Are new skills required?
- What organisational changes are needed?
- Who will our competitors be?
- How should we price our service?
- How do we market our service?

INPUT's Customer Service Programme can assist executives in answering these questions in the European market.

Customer Service Programme—Europe

INPUT®

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

Western European Customer Services Market Analysis and Forecast, 1991-1996—This report surveys the market for customer services and forecasts user expenditures on equipment and systems software maintenance, professional services and education and training associated with equipment and systems software. The report enables customer service executives to size the market and gain valuable knowledge about differences among countries, and differences in spending among various market sectors.

Independent Maintenance—Western Europe, 1991-1996—Independent maintenance vendors are still gaining market share, but as service revenues from equipment maintenance decline, independent vendors face the challenge of creating alternative, higher-growth revenue streams. This report is crucial for independent vendors and equipment vendors to gain valuable competitive information and an informed view of the future market directions for independent maintenance companies. The report profiles leading independent maintenance companies, sizes the market and discusses market penetration trends.

USER TRENDS AND ISSUES REPORTS

Customer Service in Western Europe, 1991—User Satisfaction Analysis—This set of three reports, covering large systems, medium systems and PCs and workstations, gives customer service executives valuable data on user satisfaction. In 1990, INPUT surveyed well over 1,000 users in Europe. The reports allow vendors to make comparisons with other vendors' ratings, overall European ratings and also allow for comparisons with the previous years' results.

Customer Service in Western Europe, 1991-1996—User Issues—This companion set of reports builds upon INPUT's extensive user research to highlight issues in European customer service. These three volumes cover large systems, medium systems and PCs and workstations, and they provide analysis on clients' attitudes and concerns. The reports provide valuable evaluation of the issues, and give advice and recommendations to vendors based upon the European survey of over 1,000 customer service users.

Customer Service Programme—Europe

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PROFESSIONAL SERVICES REPORTS

Environmental Services for Western European Customer Services Vendors, 1991-1996—This report can assist customer service organisations that are already involved in providing environmental services or that are considering entering the market. Many customer service vendors are broadening their service portfolios, offering services such as structured wiring, air conditioning and power sources. This is creating an important alternative revenue stream. The report can help vendors consolidate their positions by defining and sizing the market and discussing the opportunities available. User and vendor issues are discussed.

Systems Operations for Customer Service Vendors in Western Europe, 1991-1996—As a high-growth area, this market provides customer service vendors with an opportunity to regain some of the lost revenues caused by a slowdown in the growth from equipment maintenance revenues. The report sizes the market in Europe and identifies vendors already active in this area. It recommends strategies for vendors to enter the market and contains discussion on user issues, so that executives can target the opportunities effectively.

Channel Support Issues in Western European Customer Services, 1991-1996—As more and more sales are derived from indirect channels, important issues are raised. One major concern is that the VARs, dealers and distributors are selling equipment without necessarily having the expertise to support it. This often results in users becoming isolated from the equipment vendors. This report will assist equipment vendors and third-party organisations to avoid some of the pitfalls in supporting their users, and recommends strategies for increasing user satisfaction with service.

Software Support Issues in Western European Customer Services, 1991-1996—Customer service vendors need to extend their levels of software support as they widen their portfolio of services. This report examines the issues of providing full software support for both systems and applications software. The report can help customer service organisations to plan their future strategies for providing full software support by discussing the skill requirements needed, user expectations, and the future direction of software support services.

SERVICE UPDATE

Service Update is a monthly newsletter that tracks developments in the customer service industry. It keeps customer service executives up-to-date with trends in the industry and provides valuable competitive information.

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RESEARCH BULLETINS

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SERVICES

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Clients can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- The size and five-year growth of the U.K. hardware maintenance market in real terms (excluding inflation), divided among large, medium and small systems.
- The market penetration of vendor-provided environmental planning services across various market sectors in Western Europe.
- The range of software support services provided by company x.

Consulting Support

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INPUT® EDI Reporter INTERNATIONAL

A Monthly Publication from INPUT's **EDI Program**

Vol. 6 No. 1 January 1991

IN THIS ISSUE:

EDI and Taxation

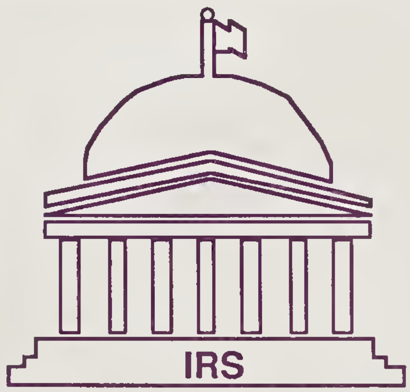
Perhaps in 10 years, we will receive an electronic 1040 in our electronic mailboxes the day after Christmas. And then, come midnight April 15, network transmission volumes will peak as taxpayers zap their returns in at the last minute.

The mechanisms to make this scenario come to pass are being installed now.

A number of EDI data formats are now available, or will be shortly, to facilitate the filing of tax information and the payment of taxes with electronic funds transfer (EFT).

The main work to date consists of:

- The creation of a standardized notes segment (the TXP) that can be attached to an ACH CCD+ format. The TXP with a CCD+ allows corporations to pay state taxes electronically. The TXP structure, developed using X12 syntax, specifies the taxpayer's identification number, what tax is being paid, the period of time that the tax is being paid for, and how much is being paid (with a breakout of the dollar amount applied to tax, penalty, and interest).



- The creation of the X12 826 transaction set, the tax information reporting format. Government agencies use this to exchange information for tax purposes. For example, Social Security, Veteran's Administration, and welfare agencies communicate information about an individual's tax status.

Continued on next page

Taxation. . . *from page 2*

- The work on the X12 813 format, the electronic tax return. The format, under development by task group 3 of the ANSI X12 Finance Committee, is a generic tax return for state, federal and local governments. For individuals, it would be used by a tax preparation service (not directly by individuals). It is designed not just for individual income tax, but for all kinds of taxes: corporate income tax, license taxes, sales and use taxes, withholding taxes, motor fuels taxes, alcohol taxes, bingo taxes, mineral reporting taxes, etc.

- A recent pilot project by the Internal Revenue Service where corporations paid Federal Tax Deposit (FTDs) electronically. FTDs are those portions of employee paychecks that are witheld by the government.

Exhibit A diagrams EDI and EFT data flows for tax payments.

Seventeen states currently allow corporations to pay taxes electronically, according to the **Federation of Tax Administrators** (Washington, D.C.). Exhibit B shows the status of state EFT programs. Given the number of states considering electronic payment options, the Federation estimates that as many as 35 states will be using EFT in the next two to three years.

To date, states with an electronic tax payment option have a payment threshold for determining which corporate taxpayers should file via EFT. The most

Exhibit A

Formats Involved in Taxation

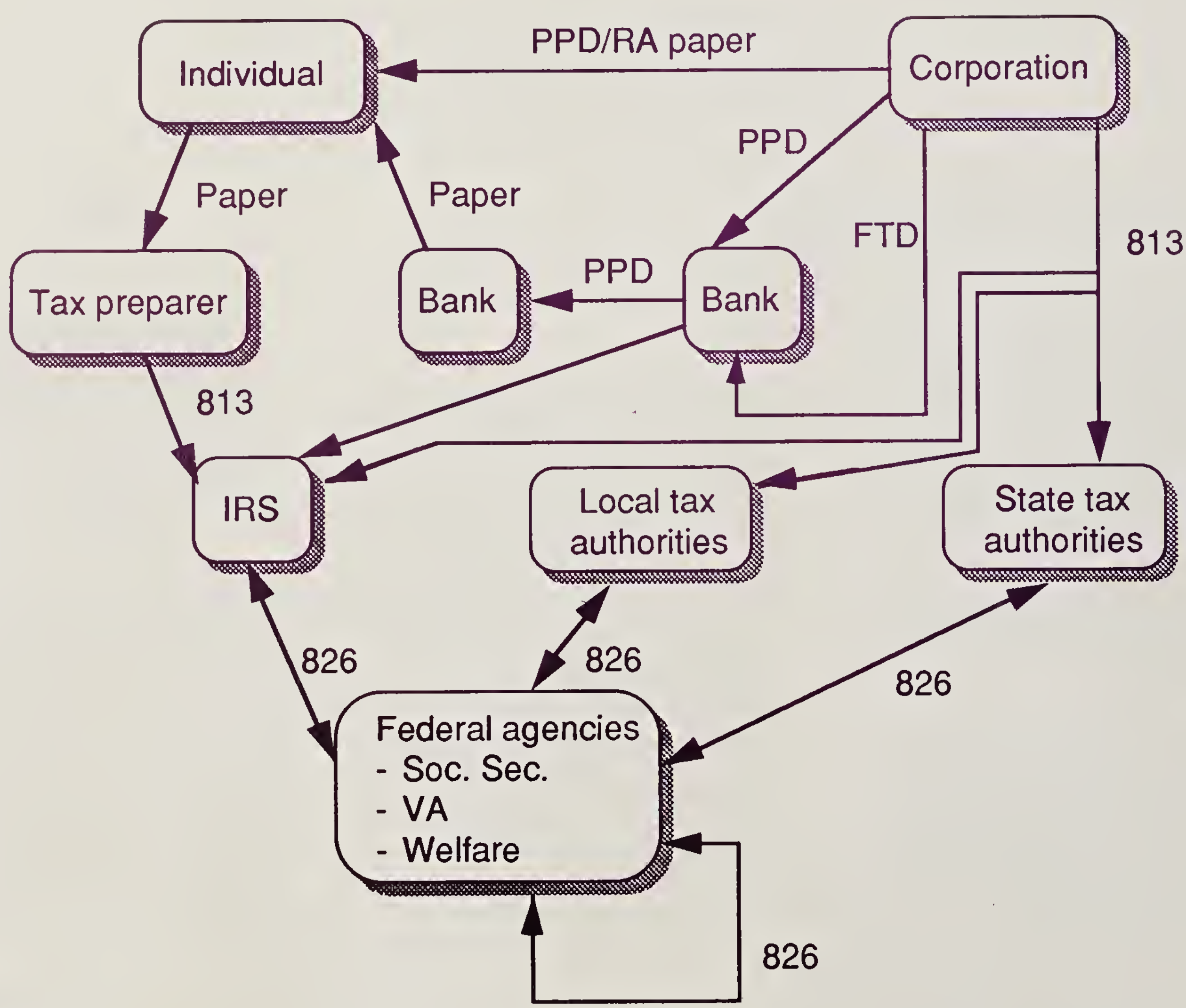
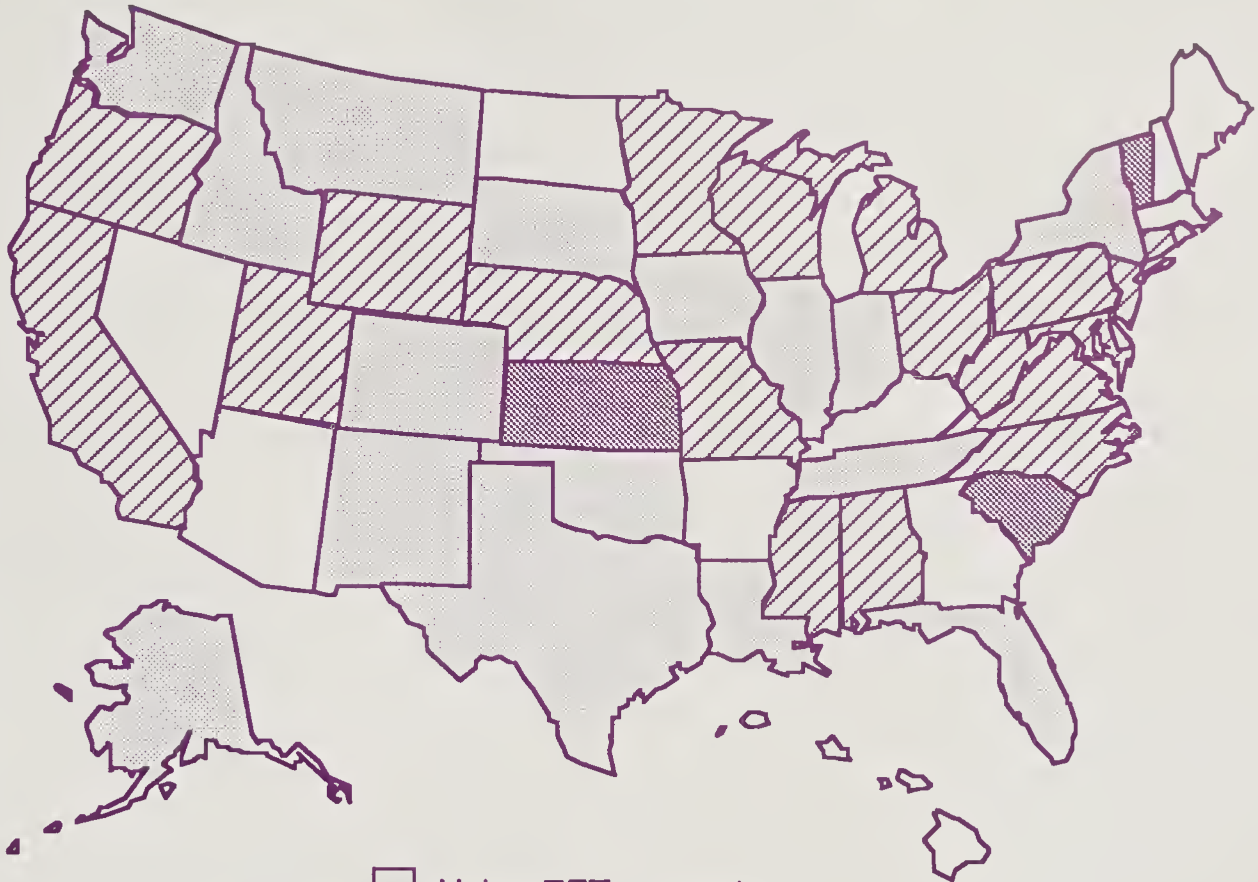


Exhibit B

Status of State EFT Programs



Source: Federation of Tax Administrators, September 1990

common threshold in use is where the payment exceeds $20,000 or where the average liability per tax period is $20,000 or greater.

Tax payments may be the fastest growing segment of the electronic payments market for the next several years. Electronic trade payment between corporations, by contrast, is growing more slowly than expected, hampered by user difficulty in integrating systems, the slow pace of EDI adoption in general, concern over float issues (usually unwarranted), and infrastructure fragmentation in the banking industry. For further background, please refer to the new INPUT report, *Developments in Corporate Electronic Trade Payments.*

Tax payment may be adopted faster than trade payments because it requires less system investment and operational expense from the corporation. For example, using a debit payment mechanism (see below), corporations merely make a toll-free telephone call to the state authority to initiate a payment. The authority is responsible for enacting the funds transfer through the banking system. Furthermore, tax authorities are adopting a proactive stance toward electronic tax payments, offering

Continued on next page

Taxation. . .*from page 3*

educational programs, hotline-support bureaus, and other measures that streamline the steps that corporations will take to participate.

In addition, electronic methods to pay recurrent, same-sum tax payments (as in employee payroll taxes—FTDs) are easier to implement than variable-amount corporate payments.

As history has demonstrated, government involvement in new technological horizons has often been the critical ingredient that legitimizes and subsidizes the technology for the private sector. The federal government's use of the ACH to make Social Security payments was the predominant application of the ACH for the first ten years of its existence. Corporate electronic payment may get its jump-start as governmental bodies—federal, state, and local—promote EDI/EFT as an option to pay a variety of taxes.

Source: Robert Barr, South Carolina Tax Commission, 803-737-4689

Document: The Use of Electronic Funds Transfer for State Tax Payments, A Report with Recommendations. October 1990. Research Report No. 134. Federation of Tax Administrators, Washington, D.C. 202-624-5894. ■

Debit Payment Mechanism Growing in Popularity

Although defying the basic human concern of keeping other hands from touching one's own pile of cash, corporations and tax authorities are seeing that the EFT debit method may be more effective and desirable than the credit method for making payments.

The difference between the two methods is determined by who sets the interbank funds transfer mechanism in motion—the company owing the money or the company (or tax authority) owed the money. With the credit mechanism, the owing company initiates the funds transfer, whereas with the debit mechanism, the company owed initiates the transfer.

With the credit mechanism, the owing company (after receiving an invoice or anticipating a tax deadline) sends an instruction to its bank to move funds to the owed company's bank. With the debit mechanism, the *owed* company sends an instruction to its bank telling it to collect funds from the owing company's bank. It may, in fact, communicate directly with the owing company's bank, telling it to transfer funds. In any case, a debit is when the owed company and its bank essentially "request" funds, as opposed to a credit, when the owing company and its bank "offer" funds.

The use of electronic payments may get a boost if more corporations adopt the debit mechanism, according to a number of pioneer users of electronic payments. Adoption of electronic payments by corporations has a built-in disincentive because most corporations are not yet willing to invest in systems that enable them to increase the speed and efficiency by which they disburse money. The old-fashioned way of paying with paper checks is psychologically more reassuring. However, if the expense of electronic payments is placed on the receiver of the funds, adoption may accelerate. The recipient, by contrast, is willing to pay to get its money faster.

Debit mechanisms are favored by selling companies and tax authorities because, being the ones that are owed money, they have the built-in incentive and are therefore willing to manage the process of getting their deserved funds delivered to them. Furthermore, they absorb all the transaction costs of the funds transfer (bank and network fees, and other software and systems costs).

All 17 states that offer electronic tax filing offer the debit mechanism (along with the credit

mechanism). Instead of the taxpayer notifying its financial institution to initiate the payment (as in the credit mechanism), the taxpayer notifies the state. The state, through its bank, then initiates the transaction through the ACH network to debit the taxpayer's account and credit the state's account a like amount.

All 17 states, at this point, have contracted for the services of a third-party vendor in processing debit transactions. With this arrangement, the taxpayer contacts the state's vendor (usually through a toll-free telephone call) and provides certain information involving the tax being paid, payment amount, taxpayer identification number, and other tax information. The vendor then initiates the transaction through a financial institution into the ACH system. The vendor also supplies the state with the information obtained in the phone call from the taxpayer so that it may update its taxpayer accounting and other systems. This may be provided on tape or electronically.

Advantages of the debit mechanism are the following:

- The chief advantage of the debit mechanism is that the obligation and hassle of initiating the funds transfer is placed on the entity that is owed the money. Once it has made the authorizing telephone call or communication, the paying company has nothing else to do. The receiver of funds is responsible for all action and the successful completion of the transaction. The paying company's exposure for late payment penalties in the event of a failed transaction or some other error is therefore limited, as well, provided the initial authorizing phone call is made on a timely basis.

- Costs for a debit transaction are borne by the collecting (selling) company, not the paying company. With the credit transaction, the paying company must pay bank processing fees and telecommunication/VAN fees.

- Debit payments are less prone to errors than credit payments. On a debit payment, billing or tax statement data is transmitted via a value-added network to the paying company; therefore, error correction and editing routines can be performed on it before it is sent into the banking/payment system. Credit transactions, however, generally enter the payment system without any such editing. (Addenda records are created by the paying company and sent directly to its bank, which then enters it into the ACH.) Credit transactions are therefore somewhat prone to error, and reconciling them can increase labor costs.

Potential disadvantages of the debit mechanism are the following:

- The buying company perceives that its account can be debited without its authorization. This does not have to be the case when every debit must have an auditable authorization communication before it is enacted.

Tax authorities, consumer billing at utilities, and a few corporate-to-corporate EDI/EFT programs have adopted the debit payment mechanism. Still, credit mechanisms are the common form of EDI/EFT today. ■

Consumer Use of the Debit Mechanism

Three-and-a half percent of the customers (39,550) of **Public Service Company of Colorado** (the state's power utility) pay their monthly bills electronically. Using the Prearranged Payment and Disbursement (PPD) data format of the National Automated Clearinghouse Association (NACHA), power consumers have their checking or savings accounts debited each month for the amount owed. Unlike other uses of the PPD for consumer payments (for insurance premiums), the power payments vary in amount from month to month. Consumers are still sent a paper statement each month and have seven days in which to stop the automatic withdrawal if they disagree with a billing. The payment program, called ZipCheck, is a marketing package developed by Pittsburgh National Bank and made available to its customers to help them promote an EFT program. ■

EDI 1990: Year in Review

Grouped by topic, the following were key developments in the EDI marketplace during 1990.

New Product Innovations

Event-Driven EDI—the sending, receiving, and processing of EDI transactions (such as purchase orders, inventory inquiries, etc.) immediately, when they happen, as opposed to saving them up in batches to be processed once or a few times per day. Vendors with this new kind of product are **Sterling Software** in cooperation with **American Software** (Atlanta, GA), and **American Business Computer**.

Customer-Originated Electronic Payments—a network service from **GE Information Services** that allows a corporation to electronically collect payments from its customers. Paying companies can send proprietary formats to, or interconnect via dumb terminal with GEIS. GEIS processes the information, sends payment instructions to the buyer and seller banks involved, and reports to the receiving company.

The EDI/Communications Gateway Software—a single, multipurpose switching and store-and-forward platform through which a corporation interconnects applications and networks internal and external to the company. It may support some or all EDI, E-mail, file transfer, and real-time data communications. Vendors of this software include **Sterling Software** (Gentran), **Mpact EDI Systems** (MessageWay), **Digital Equipment Corporation** (DEC/EDI), **American Business Computer, EDI Solutions, SoftSwitch, GEIS, Control Data Corporation/Lawrence Livermore Laboratories**.

EDI Data Bases—The transaction data base pioneered by **Sterling Software** was given a trademarked name, MarketQuest. **AT&T/Istel** launched Formtrac, an on-line data base that acts as an electronic, multivendor clearinghouse for office supplies. Trading partner data bases from **IBM, INFONET,** and **First Interstate Bank** will be made available on-line to corporate customers to let them know the EDI capability of trading partners (availability, acceptable transaction sets, software configuration, etc.) and to help them find new EDI trading partners.

Turnkey EDI Systems—**Sears, IBM** (QuickEDI program), and **FoodCom** launched services that **Harbinger** and **Sterling Software** had earlier developed: marketing EDI software and services to hub companies, installing EDI software with a given company's community of suppliers so that the hub and its spokes conduct business via EDI.

EDI/EFT VAN Bank Services—Alliances among third-party, value-added networks and banks proliferated early in the year. However, the alliances have not substantially impacted the slow adoption of corporate electronic payment services in 1990.

New EDI Applications/New Industries

Construction. The Construction Industry Institute (Austin, TX) released a report this year encouraging large building contractors to use EDI. A construction industry action group has been formed to develop X12 transaction sets and guidelines.

Education. The American Association of College Registrars and Admissions Officers has an EDI committee that has submitted an X12 format to DISA for the electronic exchange of student transcripts among colleges and universities. Universities in Texas and Florida are pioneering the use of EDI for this purpose.

Travel, Tourism, and Leisure. An ANSI X12 Task Group was formed this year to design transaction sets for this industry, which includes airlines, travel agencies, hotels and motels, car rental companies, cruise operators, train and motor coach companies, tour companies, museums, national parks, and computerized reservation operators. The group is developing one of the first real-time applications of EDI for use in reservation systems. The group, although an X12 Task Group, is developing its formats using EDIFACT syntax.

Media Distribution. The film and magazine publishing industries are beginning to adopt EDI transaction sets and are getting involved in the X12 standards process.

Health care. An X12 transaction set was designed this year for the submission of health care insurance claims by hospitals and health care providers to insurance companies. Already

several insurance companies and hospitals use proprietary EDI systems. The standardized format should enable a much greater number of users to attain the efficiencies of EDI.

Electronic Tax Payments. State governments launched electronic tax payment options for corporations. An EDI data format was created and sanctioned by both NACHA and ANSI X12 by which corporations can itemize the kinds of taxes paid and their amounts in an addendum to the CCD+ NACHA payment format. The Federation of Tax Administrators released a report to help state governments develop electronic tax payment programs.

Product Introductions

DEC/EDI from **Digital Equipment Corporation** (Maynard, MA). Along with a host of professional services and joint marketing arrangements with software and service companies, Digital released its EDI translation software product this year. The software is available for the entire range of Digital's VAX systems.

IBM PC QuickEDI and DataInterchange/2 from **IBM** (Tampa, FL). IBM released these two EDI translation software packages this year and completed its EDI software offering. Now it offers software for PCs (both MS-DOS and OS/2 - based) through mainframes. IBM PC QuickEDI is MS-DOS translation software and is part of IBM's sponsor program (bringing up whole trading communities around a single hub—"sponsor"—company). DataInterchange/2 is translation software that runs in the OS/2 environment.

Trading Partner from **TSI International** (Norwalk, CT). TSI International developed this mainframe-based EDI translation software on its own. Then it purchased the EDI translation software product, TranSlate, from TranSettlements Inc. (Atlanta, GA), one of the original commercial mainframe translators. The company supports both products.

MessageWay and XWay from **Mpact EDI Systems** (Livonia, MI). These two Tandem-based messaging and EDI software products are designed for high-volume, real-time interorganizational communications. Mpact, spun off of the former **Merit Systems Inc.** (itself purchased by **CAP Gemini**), originally built these for **Chrysler**. In 1990, it commercialized them for other large EDI users.

Acquisitions and Alliances

MCI bought 25% of **INFONET**, the international value-added network consortium.

AT&T bought the network services business of **Western Union** (Upper Saddle River, NJ), including its EasyLink messaging and EDI services.

TSI International (Norwalk, CT) bought all rights to the TranSlate EDI translation software of **TranSettlements Inc.** (Atlanta, GA). TSI did not buy the processing services business of TranSettlements, which has remained independent.

Sterling Software (Columbus, OH), a provider of both EDI software and processing services, bought software vendor **Metro-Mark Integrated Systems** (Roslyn Heights, NY), giving Sterling the greatest market share in the EDI translation software market.

Harbinger EDI Services (Atlanta, GA) signed agreements with **Bell Atlantic** (Arlington, VA) and **U.S. Sprint/Telenet** (Reston, VA) that allows these telephone companies to resell Harbinger's EDI switch/mailbox software platform and PC-based EDI translation package under their own label. Both telephone companies are offering EDI services.

NYNEX Corporation bought financial software vendor **Stockholder Systems Inc.** (maker of EDI/EFT software), **Lamarian Systems** (a systems integrator specializing in port-community and U.S. Customs EDI systems), and **Le Roux Pitts and Associates** (a software developer of point-of-sale and electronic funds transfer systems).

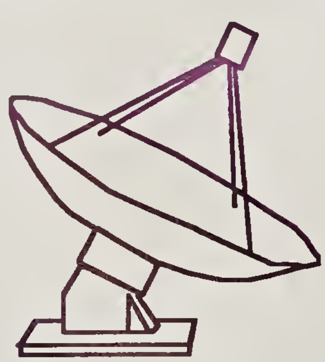
Integral Midrange, a software company based in Walnut Creek, CA, bought translation software vendor, **Wright Systems**, of Plymouth, MI.

For a comprehensive overview of the EDI market, please refer to INPUT's report, *The EDI Market, 1990-1995: Forecasts, Implementations, Trends.* ■

Is VSAT EDI an Option?

More and more large companies are using very small aperture terminal (VSAT) satellite systems to link corporate computers. Particularly, companies with many geographically dispersed facilities—such as hotels, retailers, auto dealers, and manufacturers—are finding VSAT data communications an economical alternative to terrestrial-based telecommunication networks. VSAT networks are already acting as conduits for credit card authorizations, car and hotel reservation processing, inventory advices, and product orders between manufacturers and retail outlets. It is only a matter of time before EDI transmissions use VSATs.

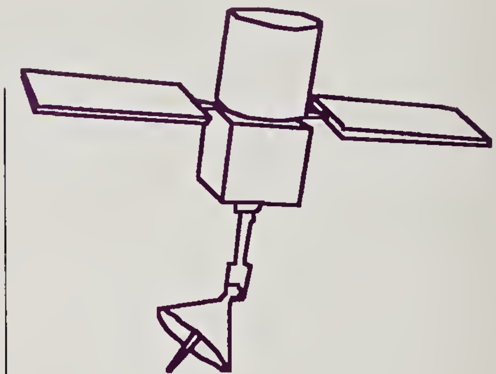
An emerging trend that EDI users and network service providers should pay attention to is the use of shared VSAT networks by companies. The shared network reduces costs to the user company, and potentially, revenues to the network provider. **The National Retail Federation** is organizing SPECNET, a shared VSAT network for specialty retail stores. **The National Automobile Dealers Association** is working out an agreement so that the existing proprietary VSAT networks of **GM** and **Chrysler** can be used by dealer franchises of other car makers, thus helping multifranchise dealerships lower communications costs.



In the case of SPECNET, a single VSAT dish would serve all specialty retailers in a single mall location. Also, SPECNET will negotiate volume discounts for equipment purchases from vendors. The network would be used by retailers for high throughput credit authorization, store polling capabilities, frequent shopper tracking, inventory look-up, price management, and electronic buying. Sharing the network allows small specialty stores to compete with high-volume merchandisers such as **Wal-Mart, K mart**, and **Target**, which have their own private satellite networks.

VSAT networks are also proving valuable to trucking companies that need truck location/shipment tracking systems.

Over the last 10 years, EDI network service providers have had their market eroded by new technologies, particularly in the area of software. Whereas early in the history of EDI, translation between various data formats was performed by the network, today it is mostly performed by software resident at user sites. The emergence of communication gateway software and the promise of X.400 technology accelerates the ongoing trend of companies building their own private messaging networks, again displacing the role of third-party network providers.



As value-added services migrate from VAN to user site, the VAN business is more and more a commodity, low-margin transport business. VSAT technology appears to further this trend. Users are spending less money but accomplishing more than they did with earlier data network configurations.

Leading vendors of VSAT networks include: **Tridom Corp.** (of **AT&T**), **Hughes Network Systems**, and **Contel ASC**. ■

New Law on Liability for Electronic Payments

Corporations considering adopting an electronic payment capability with their trading partners need to be concerned about systems security, particularly the transmission of payment instructions/remittance advices between corporation and bank. (Security among banks, on the ACH, has been established through many years of evolution.) Most VANs do not support encryption or

authentication services at this time. Users are advised to encrypt their payment-related transmissions when sending them over any kind of public telecommunication lines. These transmissions contain the numbers of the corporation's bank account. Unauthorized access to this data could result in a corporation's account being pillaged.

Related to security is the concern over liability: who is responsible when a payment is not executed as promised in a contract? In 1991, the UCC4A goes into effect. This law deals with the ACH credit transfers between corporations and between corporations and banks. (Other electronic transfers, including ones involving consumers, are not covered under UCC4A but rather under the Electronic Funds Transfer Act.) The importance of UCC4A lies in its statement of liability and how liability is allocated when transfers are delayed or when payment is sent to the wrong recipient.

Section 4A says the liability depends largely on the security agreement drawn up between the two parties making the transfer. Such security agreements may address passwords, message authentication, callbacks, encryption, and proper authorization. This is a significant legal requirement because in the past, many corporations have neglected such agreements.

Section 4A requires that the agreement must be "commercially reasonable." As a result, banks and VANs are required to supply security measures to their services using commercially available security systems. They will be liable if a breakdown occurs where it can be demonstrated that a lack of commercially available technology was the cause or a contributing factor. ■

EDI Software Maintenance: Emerging Market and Political Dilemma

Electronic data interchange integrates formerly isolated computer applications into a single, distributed system on two levels. Within the firm, various corporate functions (purchasing, accounts payable, receiving, etc.) are integrated. Within a company's trading community, various value-adding processes are integrated (the procurement of raw supplies, overhead supplies, transportation, etc. from suppliers and the sale of the company's products to customers).

The distributed processing software environment that results from electronically interconnecting individual application programs presents a major software maintenance challenge. INPUT views this as an opportunity for EDI market vendors.

Because multisystem synchronization is the name of the game in EDI, software maintenance is critical to EDI and it occurs in two dimensions. Software vendors must service their customers' installations to accommodate new or modified data format standards and updates to the software architecture. Trading partners must communicate changes to each other (regarding transaction sets, versions, etc.), otherwise their interconnected systems risk being disabled.

Two solutions are emerging to service the extended EDI software environment.

EDI server architecture places a single translator on a corporate network so that all functional groups using EDI can access it. This centralizes maintenance as well as eliminates costs of acquiring multiple translators.

Another solution, yet to be tried on a production scale, is remote updating by vendors over the network. Some network vendors provide both software and network service and offer turnkey management of a single large company's EDI partnerships. These vendors (**Harbinger, IBM, Sears, Sterling Software**) are responsible for synchronizing the EDI software at both the hub company and the many spoke companies. Some of these vendors are developing programs where they alter the EDI software of their customers by sending changes over the network.

Continued on next page

EDI SW. . .from page 9

For these companies, a recent event in the software business sheds an ominous light on getting such remote servicing of software off the ground.

Revlon Inc. is suing **Logisticon Inc.** after the software vendor remotely shut down its inventory software over telephone lines. Because Revlon witheld payment on a portion of a contract, Logisticon retaliated by activating computer viruses that were implanted in the inventory control software. Revlon's two main distribution centers were shut down for three days, hundreds of workers were idled, and as much as $20 million of product deliveries were halted, according to Revlon officials.

Software maintenance is a critical concern for EDI users. INPUT recommends that software and service vendors look more closely at what types of services can be offered to fill this need. INPUT cautions that maintenance is tricky due to the extended distributed software environment that results from EDI. Checks and balances, with clear designations of authority, must be spelled out regarding who can implement changes. EDI requires the collective action of vendors, trading partners, functional departments within companies, and standards groups to make systems operational. It is inevitable, as is with any collection of groups of diverse interests, that political rules and policies must be stipulated. ■

Developments in Corporate Electronic Trade Payments

Corporate use of electronic trade payments (otherwise known as financial EDI or EDI/EFT) is sparse, although over the next couple of years activity levels should rise rapidly.

In a new report, INPUT finds that the largest 1,000 companies in the U.S. are experimenting with electronic payments to or from their trading partners, including tax payments to government. Altogether in 1990, six million corporate trade payments were made electronically. INPUT expects this volume level to reach 50 million by 1995, for a compound annual growth rate in payment volume of 50%.

The increase in volume level is due to the implementation plans of existing hub financial EDI users, not necessarily from new users coming on board. Like EDI implementations, financial EDI follows a hub-and-spoke growth pattern, with large companies pushing their many trading partners to adopt.

While offering many cost-reducing efficiencies to both buyers and sellers, electronic payment between corporations faces many inhibiting market forces. Foremost is the assymetry of incentives and benefits to users. Although electronic payments can be implemented in a win-win fashion, generally it is the recipient of payment (the seller/payee) who has the incentive to change from using paper checks to using EFT, yet typically lacks the clout with the payor/buyer.

Also inhibiting growth of financial EDI is the fact that the banking industry has not yet established a uniform payment infrastructure for corporations to use. Of the 14,000 banks in the U.S., only 25 are capable of originating and receiving the electronic payment formats designed specifically for corporate trade payments. All banks can receive payment formats that have limited remittance data capacity. Nevertheless, these less sophisticated formats are being used for electronic payments. Remittance data is often sent through the Automated Clearinghouse (ACH). Although third-party networks offer services to deliver this data, corporations are not using these services for the most part. Corporations let banks, the ACH and the U.S. postal system handle the vast majority of payment traffic.

INPUT's report found that users of electronic payments alter some fundamental payment practices when they switch from checks to electronics. A buyer will make fewer but larger payments in a given

period. A corporation consolidates not only its payments, but also the number of banks it uses to disburse the payments. Often, selling companies agree to extend the payment due dates by three days to compensate for the loss of mail float. Companies that are conducting electronic payments with trading partners are typically also conducting EDI with them. Usually, EDI is implemented prior to EDI/EFT implementation.

Like other new technological systems (such as the Automated Clearinghouse), government use promises to establish and legitimize electronic corporate payments for the private sector. Programs to pay government contractors and suppliers, and state and federal programs to collect corporate taxes electronically will boost corporate acceptance of electronic trade payments.

INPUT's report on this subject is called *Developments in Corporate Electronic Trade Payments*. For more information, contact any INPUT office (telephone numbers on the back of this newsletter). ■

News Bits

A December 17 (1990) article in the **Financial Times** stated that **British Telecom** and **IBM** are in the advanced stages of a joint plan to offer a comprehensive communications service to large international companies. The planned alliance has been under discussion for two years, the article states. Such an alliance would result in the creation of the largest worldwide value-added network provider.

Catherine Hapka is leaving her position as head of **Control Data Corporation's** Data Services Division, which includes the Redinet EDI VAN. **William Miller,** CDC CFO, will assume Ms. Hapka's duties in his new capacity as head of CDC's Information Services Group. CDC president and CEO, **Larry Perlman,** will assume the duties of CFO.

Calendar

February 4-8, 1991, Hyatt Regency Embarcadero, San Francisco, CA, ASC X12 Trimester Meeting, Data Interchange Standards Association, 703-548-7005.

March 10-13, 1991, San Francisco Marriott, 1991 NACHA Conference, NACHA, 703-742-9190

March 10-15, 1991, Doral Resort and Country Club, Miami, FL, National Customs Brokers and Forwarders Association of America, Inc. Annual Convention, NCBFAA, 212-432-0050.

March 26-27, 1991, Nashville, TN, Quick Response 91, AIM USA, 412-963-8588.

*April 7-10, 1991, Palmer House, Chicago, IL, Corporate EFT/ Financial EDI Conference, University of North Carolina, Chapel Hill, Business School, 919-962-9630.

April 15-19, San Francisco, UN/ EDIFACT Joint Rapporteurs Meeting

April 24-26, 1991, Marriott's Orlando World Center, Orlando, FL, X12/DISA EDI '91, 703-548-7005

May 15-17, 1991, Jolly Hotel, Milan, Italy, ELEDIS '91, XCOMS International, 39-2-952-2102.

June 3-7, 1991, Innisbrook Resort, Tampa, FL, ASC X12 Trimester Meeting, Data Interchange Standards Association, 703-548-7005.

June 18-19, 1991, Mayflower Hotel, Washington, DC, 10th Annual International Trade and Computerization Conference, NCITD, 212-925-1400.

September 4-6, 1991, Brussels Congress Centre, Belgium, 3rd International Congress of EDI Users, International Data Exchange Association, Brussels, Belgium, 32-2-736-9715.

*September 23-27, Paris, UN/ EDIFACT Joint Rapporteurs

September 30-October 4, 1991, ASC X12 Trimester Meeting, (site to be announced), Data Interchange Standards Association, 703-548-7005.

October 7-9, Hong Kong Convention and Exhibition Centre, EDI Asia '91, Tradelink, 852-804-1033.

December 11-13, 1991, San Diego, CA, 23rd EDI Systems Conference, EDIA, 703-838-8042.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050
Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Ste. 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

INPUT EDI Reporter International

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The *EDI Reporter International* is published each month by INPUT and is available for $350.00 per year/per subscriber (Outside North America - $375 per year). To subscribe, or for more information about INPUT's Electronic Data Interchange reports, conferences, and continuing "Hotline" support, contact any INPUT office.

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U.S. Information Services Market Analysis Program

INPUT

INPUT's premier research service, providing an in-depth analysis and forecast of the U.S. information services markets.

WRITTEN ELEMENTS:

Market Analysis Reports	Forecasts of markets, vendor market shares, and industry trends in software products, processing, professional and network services, and turnkey systems markets.
Industry Sector Reports	Forecasts of markets and analysis of opportunities in 16 industry and 7 cross-industry sectors.
Market Forecast Book and Data Base	Annual forecasts for all market sectors in printed and diskette format, including systems integration and systems operations.
Research Bulletins	Frequent summaries of research projects, analyses of events and opinions on issues from experts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies and issues.

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BENEFITS
Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities. Support market strategy changes. A single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

The Market Analysis Program sits at the center of INPUT's analysis of the U.S. Information Services $100 billion market. The program provides the framework for all of INPUT's market analysis work and presents the subscriber with a full analysis of that market.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS
In-depth analysis and forecasts, 1991-1996, for the professional services, processing services, network services, systems software products, applications software products and turnkey systems market sectors.

INDUSTRY SECTOR REPORTS
Analysis and forecasts for 16 specific industy and 7 cross-industry markets.

Banking & Finance	Discrete Manufacturing
Insurance	Process Manufacturing
Medical/Healthcare	Retail Distribution
Business Services	Wholesale Distribution
Education	Utilities
Telecommunications	Transportation
State & Local Govt.	Federal Govt.
Consumer Services	Misc. Industries
Accounting	Human Resources
Planning & Analysis	Engineering & Scientific
Office Systems	Education & Training
Other	

MARKET FORECAST BOOK & DATA BASE
Published at year end as the annual summation of all INPUT market forecasts for the calendar year, including the systems integration and systems operations sectors.

RESEARCH BULLETINS
Concise summations of research in process, breaking industry trends and changes in the market. Published twice a month.

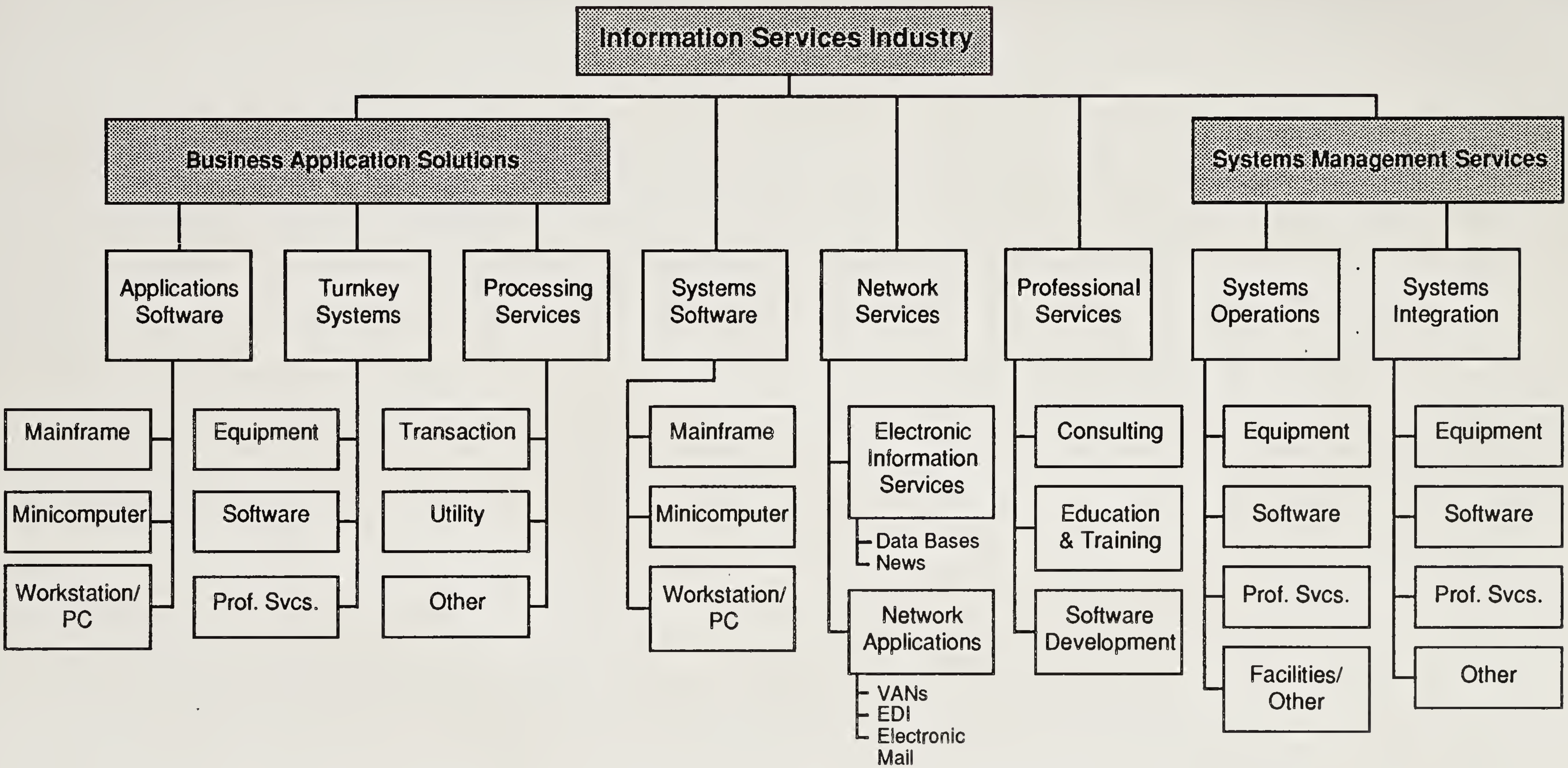
U.S. Information Services Market Analysis Program

INPUT®

SERVICES

Telephone Inquiry	"Hotline" for short ad-hoc research needs on the U.S. Information Services market. Forty hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visits	Senior INPUT staff member presents research results at client's site.
Industry or Client Conference	Two seats at INPUT's annual assessment of the industry. Additional seats at two-thirds off the list price.
Information Center Access	Client may visit and use INPUT's research library.

Information Services Industry Structure—1990



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MAMAP 11/90

Worldwide Information Services Market Forecast

INPUT®

Track the growth of the worldwide information services markets by country and region. Available to INPUT program subscribers

WRITTEN ELEMENTS:

Worldwide Information Services Market Forecast includes:

Worldwide Coverage	Five geographical regions Over 30 country markets
Full Market Coverage	Eight service delivery modes

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies and issues.

Service Agreement

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Information Systems Service

INPUT

INPUT's ongoing assessment of user requirements, and user progress with deployment of information systems and services.

WRITTEN ELEMENTS:

Trend Analysis Reports	In-depth assessments of issues facing the information systems function.
Technology Implementation Reports	Analyses of implementation successes of new technologies.
Research Bulletins	Frequent summaries of research projects, analyses of events, and opinions on issues from experts.

SERVICE ELEMENTS:

Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, and telephone.
Conference Attendance	Meeting of INPUT's clients and review of the state of the industry.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

Information Systems Service

INPUT®

The Information Systems Service provides information systems executives and information services vendors with ongoing insight into critical challenges facing the information systems function: user requirements, analysis of technology implementation, and assessment of trends impacting information systems.

BENEFITS

- Be aware of the trends when they first appear.
- Compare progress with that of other information systems organizations.
- Develop vendor marketing strategies.
- Organize information systems for success.

PROGRAM DESCRIPTION

TREND ANALYSIS REPORTS

Quantitative and qualitative assessments of such critical issues as downsizing, outsourcing, and managing technology. User requirements, management challenges, and recommendations for success are presented.

TECHNOLOGY IMPLEMENTATION REPORTS

Structured assessments of progress in the use of new technologies such as CASE, Executive Information Systems, and UNIX. Both user and vendor performance are analyzed.

PRELIMINARY REPORT DESCRIPTIONS (Preliminary List of Topics)

Buying Outside Services—A survey-based assessment of the manner in which the user (end user and information systems) are managing the process of buying software products services. This has impacts for outsourcing and for a number of vendor issues.

Open Systems Strategies—A number of major systems vendors have adopted open systems strategies. What is the real acceptance in the traditional information systems arena?

Downsizing of Information Systems —An analysis of the impacts of decentralization, outsourcing, a move to cooperative and workstation-based applications, and tighter budgets on information systems programs, many of which are downsizing.

Information Systems Service

INPUT®

CASE—An updated look at CASE, the progress made in its use, and the progress made by the vendors. An update of the 1988 five-year forecast is included.

UNIX—The 1989 UNIX Software Products report is updated with new and increased user research and an assessment of the progress with ppen systems strategies of key computer systems vendors. A new five-year forecast is provided.

RESEARCH BULLETINS

Concise summations of research in process, breaking industry trends, and changes in the information systems environment. Published monthly.

SERVICES

Consultant Access	Ongoing interaction with INPUT's senior research staff.
Industry or Client Conference	Two seats at INPUT's annual assessment of the industry. Additional seats at two-thirds off the list price.
Information Center Access	Client may visit and use INPUT's research library.

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Information Services Vendor Analysis Program

INPUT®

Provides characteristics and descriptions of providers of information systems services and products, including private companies and hidden vendors such as divisions and units of computer, aerospace, and financial companies.

WRITTEN ELEMENTS:

Vendor Profiles	Descriptions of information services vendors, their products, strategies, and financial performance. Delivered monthly.
Vendor Directory	Listing of all vendors tracked by INPUT.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies and issues.

Vendor Analysis Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees available upon request.

INPUT's 1991
U.S. Information Services Vendor Analysis Program

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Subscription to INPUT's U.S. Information Services Vendor Analysis Program:

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Tel. (415) 961-3300
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INPUT®

U.S. Electronic Data & Information Interchange Program

Provides direction and analysis in the emerging markets of electronic data interchange and electronic information interchange.

WRITTEN ELEMENTS:

Issue Studies	Target analysis of user requirements and market opportunities.
Market Analysis Reports	Analysis and forecasts of U.S. and international markets.
Monthly Newsletter	Latest developments and key industry events.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants from meetings, mail and telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

INPUT®

U.S. Electronic Data & Information Interchange Program

BENEFITS

Be aware of the trends when they first appear. Understand the impacts of market change. Capture new market opportunities, and support market strategy changes with this single source of information services market research. Save your own and your staff's time by utilizing INPUT's consultant access and hotline service.

PROGRAM DESCRIPTION

ISSUE STUDIES

EDI/EII U.S. Market Report, 1991-1996—U.S. market forecasts, a chronology of EDI events over the past 12 months, a recap of standards issues, flow charts of typical uses of standards in vertical industries, and a discussion of business opportunities and strategies that are enabled by EDI.

EDI/EII International Markets, 1991-1996—European and Japanese market analyses, plus other Pacific Rim markets.

Interorganization Information—This report will build upon the 1989 report, Services EDI Advanced Services, and include EDI and EII services and products. The report will include descriptions of products and services, how they are being deployed, and what they mean for the expansion of electronic information interchange between organizations.

Transborder Information Flow—This report will provide an assessment of issues facing organizations using electronic information interchange on an electronic basis. Included will be an assessment of the legal constraints and their current impacts on the use of EDI and EII services, the impact of the 1992 changes in Europe, and more.

EDI & EII in Insurance and Health Care—An assessment of the use of EDI and EII services and products within the insurance and health care industries, and the impacts they have on these industries.

MARKET SECTOR REPORTS

In-depth analysis and forecasts for the Electronic Data and Electronic Information Interchange market sectors. Two reports are provided: U.S. Market and International Markets.

EDI REPORTER INTERNATIONAL

A monthly newsletter summarizing recent research, reporting industry events, profiling new products and services, and presenting interviews with industry leaders.

U.S. Electronic Data & Information Interchange Program

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SERVICES

Telephone Inquiry	"Hotline" for short ad-hoc research needs on the U.S. Information Services market. Forty hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visits	Senior INPUT staff member presents research results at client's site.
Industry or Client Conference	Network with your peers and industry experts.
Information Center Access	Client may visit and use INPUT's research library.

Electronic Data & Information Interchange Program is available from INPUT, 1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300. Detailed description of services and fees available upon request.

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Customer Service *Plus* Program

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INPUT's Customer Service *Plus* Program addresses current customer service requirements and also examines nontraditional opportunities. Hence, Customer Service *Plus*.

WRITTEN ELEMENTS:

Issue Studies	Targeted areas of opportunity and analysis of critical issues.
Market Forecast	User expenditure five-year forecasts, issues, trends, and opportunities.
User Surveys	Customer satisfaction surveys: - Large-Scale - Midrange - PC/Workstation - TPM
Monthly Newsletters	Summaries of latest developments and hotline inquiries.
Research Bulletins	Frequent summaries of research projects, analyses of events, and opinions on issues from experts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain the opinion and advice of INPUT executives and consultants through meetings, mail, and telephone.
On-site Visit	Discuss your issues and concerns. Introduce experts to others in your organization and obtain presentations on the state of the industry.
Industry or Client Conference	Network with your peers and industry experts.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

INPUT®

Customer Service *Plus* Program

This program covers current customer service requirements and also provides an understanding of the potential opportunities open to customer service organizations. Hence, Customer Service *Plus*.

Customer Service *Plus* provides data, analyses, and recommendations needed for marketing, technical, financial, and organizational planning. It pinpoints user perceptions of service received and presents vendor-by-vendor service comparisons. Critical issues are discussed and service markets analyzed.

BENEFITS

- Serve your customers better by knowing their satisfaction levels with your service.
- React to your competition quickly through an awareness of their strengths and weaknesses.
- Expand your revenues by looking at new nontraditional service opportunities.
- Save your own and your staff's valuable time by utilizing INPUT's consultant access and hotline service.

PROGRAM DESCRIPTION

ISSUE STUDIES

Four of the following preliminary list of seven reports will be delivered:

- One-Stop Customer Support
- Device Resident Hardware Support
- Impact of Innovative Software Support
- Network Support: Competitive Environment
- Innovative Service Offerings
- Customer Service Partnerships
- Systems Operations

U.S. CUSTOMER SERVICE MARKET ANALYSIS REPORT

The report provides analyses and forecasts of user service expenditures by mainframe, midrange, and PC/workstation platform size, including TPM. Included in the report are ancillary services and nontraditional services offered by customer service organizations and by vendor type. Key customer service issues, trends, and opportunities are discussed.

Customer Service *Plus* Program

INPUT®

CUSTOMER SERVICE USER REQUIREMENTS REPORTS

Discusses customer satisfaction with vendor performance, including TPMs, user service, and support requirements:

- Large Systems User Requirements Report
- Midrange Systems User Requirements Report
- PC/Workstations User Requirements Report

SERVICE UPDATE

Monthly newsletter provides topical news about customer service in the United States and Europe (e.g., new vendor service policies, service offerings, vendor performance, and hotline summation).

RESEARCH BULLETINS

Concise summaries of research in progress, significant events, and other relevant issues.

SERVICES

Telephone Inquiry	"Hotline" inquiry for short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data. Forty hours of hotline service are provided each year.
Consultant Access	Continuous support from consultants and executives including reactions to events, opinions, and ideas.
On-Site Visit	An INPUT consultant presents research results and industry forecasts at your site and relates this to your specific service markets. Your issues and concerns are discussed together with industry trends. (Travel expenses are additional.)
Industry or Client Conference	Attend INPUT's assessment of the information services industry at two-thirds the list registration fee.
Information Center Access	Client may visit and use INPUT's research library.

Customer Service *Plus* Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
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Signature

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Name

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Title

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Date

FCCSP 11/90

U.S. Systems Integration Program

INPUT®

Research and analysis of the market for systems integration in information systems, networking, and automation.

WRITTEN ELEMENTS:

Market Analysis	Analysis of SI issues and trends and five-year market focus
Vendor Profiles	Descriptions of SI vendors, their characteristics, strengths and weaknesses
Topical Reports	Systems integration technology trends
	Subcontracting to client integrators
	Systems management directions and priorities
Research Bulletins	Frequent (every two weeks on the average) summaries of research projects, analysis of events, and opinions on issues from experts
SI Data Base	Access to a data base of SI contracts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions
Consultant Access	Obtain the opinions and advice of INPUT executives and consultants through meetings, mail and telephone
On-Site Visit	Discuss your issues and concerns. Receive INPUT's expert opinions through tailored presentations
Industry or Client Conference	Network with users and vendors at annual conference

INPUT®

U.S. Systems Integration Program

This program provides research and analysis of the trends and issues in the rapidly growing systems integration (SI) market. It addresses the market for vendor-provided management and implementation of solutions to complex information processing and communications problems.

BENEFITS

Strategic Planning Support	Comprehensive market research and vendor analysis are fundamental to strategic planning.
Tactical Decision Support	Research on hot market issues and events, and the SI data base, aid in resource allocation and marketing decisions.
Consulting Support	The "hotline" and access to INPUT's consultants allow you to test your ideas.
Networking	The conference provides an opportunity to establish relationships with other SI vendors.
Marketing	INPUT's familiarity with your company will promote your capabilities.

PROGRAM DESCRIPTION

REPORTS

Systems Integration Market Analysis—Examines SI issues and trends in the U.S. domestic market. SI user expenditures are forecast for the next five years by vertical industry, and marketing strategies and recommendations are included.

Systems Integration Vendor Analysis—Includes detailed profiles of the major SI vendors including organization, capabilities, business results, strategies, market focus, alliances, and INPUT's assessment of strengths and weaknesses.

Systems Integration Technology Trends—Examines technologies currently being implemented in SI programs and projects and examines those users will seek over the next five years.

Subcontracting to Client Integrators—Focuses on the SI opportunities in the secondary SI market of user-managed projects. Includes a five-year forecast of user expenditures and recommendations for participation in this market segment.

Systems Management Direction and Priorities—This report examines the major factors that are causing the accelerated acceptance of systems integration and systems operations. It identifies the systems management trends that can be anticipated in the decade ahead.

Systems Integration Data Base—Reports from INPUT's SI project data base of important projects are published periodically.

INPUT®

U.S. Systems Integration Program

RESEARCH BULLETINS

Frequently published reports on INPUT's research findings and important industry events and trends.

CONFERENCE

Subscribers attend this annual conference which provides an update on INPUT's annual research and includes guest/user speakers who present their experiences and views of systems integration.

SERVICES

Telephone Inquiry	Satisfies client requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Consultant Access	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
On-Site Visit	An INPUT consultant presents annual research at your site that is tailored to meet your executives' needs.
Information Center Access	INPUT"'s libraries in California, New Jersey, and Virginia are available for client research.

ADDITIONAL SERVICES

European Systems Management Program	A companion program, authored in INPUT's London office, addresses the SI market in Western Europe.
Site Subscriptions	Complete program services to additional sites at a substantially reduced fee.
Custom Research and Consulting	INPUT analyzes market opportunities, user needs, competitive environment, acquisition targets, etc. based on your unique needs and drawing on INPUT's existing research.
Consultant Presentations	INPUT'S consultants are available to make presentations, planning meetings, user groups, or other functions.

Systems Integration Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees available upon request.

INPUT's 1991
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Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

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SISIP 11/90

U.S. Systems Operations Program

INPUT®

Analyzes the "outsourcing" of systems operations—the revolution in the IS market in the 1990s.

WRITTEN ELEMENTS

Market Analysis	Analysis of SO issues and trends, and five-year market forecasts for applications and platform systems operations.
Vendor Profiles	Descriptions of SO vendors, their characteristics, strengths and weaknesses.
Topical Reports	Systems operations buyer values and alternatives.
	Systems management directions and priorities
Research Bulletins	Frequent (every two weeks on the average) summaries of SO research projects, analysis of events and opinions on issues from experts.
SO Data Base	Access to a data base of SO contracts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain the opinions and advice of INPUT executives and consultants through meetings mail and telephone.
On-Site Visits	Discuss your issues and concerns. Receive INPUT's expert opinions through tailored presentations.
Client Conference	Network with users and vendors at annual conference
Information Center Access	Visit our offices to review material on markets, companies, and issues.

INPUT®

U.S. Systems Operations Program

This program provides research and analysis of the trends and issues in the rapidly growing systems operations (SO) market. It addresses the market for vendor management and operations of the majority of clients' information processing activities under a long-term contract.

BENEFITS

Strategic Planning Support	Comprehensive market research and vendor analysis are fundamental to strategic planning.
Tactical Decision Support	Research on "hot" market issues and events, and the SO data base, aid in resource allocation and marketing decisions.
Consulting Support	The "hotline" and access to INPUT's consultants allow you to test your ideas.
Networking	The conference provides an opportunity to establish relationships with other SO vendors.
Marketing	INPUT's familiarity with your company will promote your capabilities.

PROGRAM DESCRIPTION

REPORTS

Systems Operations Market Analysis—Examines SO issues, trends, and marketing strategies in the U.S. domestic market, including a forecast of SO user expenditures by vertical industry for the next five years.

Systems Operations Vendor Analysis—Detailed profiles of major SO vendors: organization, capabilities, business results, strategies, market focus, alliances, and INPUT's assessment of strengths and weaknesses.

Systems Operations Buyers Values and Alternatives—Examines the driving forces and major issues facing the information systems function. Looks in-depth at the considerations involved in employing a systems operations firm from the corporate, information systems and end user perspectives.

Systems Management Direction and Priorities—Examines major factors causing accelerated acceptance of systems integration and systems operations. Identifies the systems management trends that can be anticipated in the decade ahead.

Systems Operations Data Base—Reports from INPUT's SO project data base of important projects are published periodically.

INPUT®

U.S. Systems Operations Program

RESEARCH BULLETINS

Frequently published reports on INPUT's research findings and important industry events and trends.

CONFERENCE

Subscribers attend this annual conference that provides an update on INPUT's annual research and includes guest-user speakers who present their experience and views of systems operations.

SERVICES

Telephone Inquiry	Satisfies client requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Access to INPUT Consultants	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
On-Site Visit	An INPUT consultant presents annual research at your site that is tailored to meet executives' needs.
Information Center Access	INPUT libraries in California, Virginia, and New Jersey are available for client research.

ADDITIONAL SERVICES

European Systems Management Program	A companion program, authored in INPUT's London office, addresses the SO market in Western Europe.
Site Subscriptions	Complete program services to additional sites at a substantially reduced fee.
Custom Research and Consulting	INPUT analyzes market opportunities, user needs, competitive environment, acquisition targets, etc. based on your unique needs and drawing on INPUT's existing research.
Consultant Presentations	INPUT's consultants are available to make presentations, planning meetings, user groups, or other functions.

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Federal Information Systems and Services Program

Provides specific, detailed procurement information as well as forecast of federal government markets for computer systems, telecommunications, and information services.

WRITTEN ELEMENTS:

Procurement Analysis Reports	Data and descriptions on nearly $20 billion in upcoming federal IS procurements.
Market Analysis Reports	Analysis of government IS markets, including five-year forecasts and opportunity lists.
Issue Papers	Analysis of government trends and issues, with their impact on upcoming procurements.
Market Bulletins	Reports on specific agency practices affecting procurement.
Research Bulletins	Early reports on specific agency practices affecting procurements.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions on federal IS procurements and trends, competitive and teaming information, etc.
Consultant Access	Continuous support availability relating to new developments affecting federal procurements and markets.
Client Conference	Address key IS acquisition issues and network with executives from other INPUT clients.
Client Meeting/Breakfast	Presentations and discussion of research results and market issues.

Federal Information Systems and Services Program

INPUT®

Provides lead information and qualification of federal IS procurements. Analyzes specific market areas, such as systems integration and professional services, providing five-year forecasts and survey results from both agencies and vendors.

BENEFITS

INPUT's FISSP will help you:

- Avoid hiring personnel to locate and track programs of interest
- Receive assistance in locating teaming partners
- Learn of agency initiatives and qualified leads while minimizing searches and improving staff
- Make informed decisions on planning and resource allocations
- To take advantage of INPUT's government contacts and insight

PROGRAM DESCRIPTION

PROCUREMENT ANALYSIS REPORTS

Reports include the following information:

Agency Name
Program Title
Funding by Fiscal Year
Procurement Schedule Target Dates
- Draft
- CBD Announcement
- Pre-Bid Conference
- RFP-RFQ Release
- Bid Due Date
- Award Date

Description of Program
Systems/Services to be Acquired
Contract Types
Contract Duration
Contracting Office (name and address)
Program Office (name and address)
Background/Function
Analysis
Acquisition Plan
Awards to Date

MARKET ANALYSIS REPORTS

Federal Computer Equipment Market—Analyzes the market for supercomputers, large-scale, midrange, and microcomputers, and workstations. Examines the effects of applications of downsizing on equipment segments.

Federal Software and Related Services Market—Updates general software and Ada forecasts, and provides a new forecast for UNIX- and CASE-related products and services.

Federal Professional Services Market—Forecasts the professional services market, including consulting, education, training, programming and analysis, systems operations (facilities management), and additional areas.

Federal Systems Integration Market—Forecasts the federal systems integration market by component. Analyzes agency trends towards fewer and larger procurements and the resulting impact on teaming arrangements among vendors.

INPUT®

Federal Information Systems and Services Program

ISSUE PAPERS

Federal Geographic Information Systems Market—Examines the growing popularity of GIS in the federal market. Discusses the leading applications and agency users, as well as leading vendors, and gives sizing and forecasting for this market.

Federal Electronic Imaging Market—Assesses the growing role this technology will play in reducing federal administrative costs and document handling, including leading federal applications, agencies, and vendors.

Environmental Protection Agency Information Systems Market—Discusses the role of IS in implementing clean air, clean water, and toxic substances control initiatives, as well as identifying major IS initiatives.

Defense Communications Agency Information Systems Market—Examines the expanding role of DCA in fostering connectivity and interoperability of DoD IS, in light of application consolidation initiatives. Also investigates DCA functions in acquiring FTS 2000 services.

FEDERAL MARKET BULLETINS

Uncompensated Overtime—Addresses the controversial practices of some professional services firms to bid more than 40 hours of work weekly, thus lowering hourly rates and, in many cases, improving their competitive standing.

Federal Anti-Drug Program—Identifies and analyzes the IS activities relating to federal drug interdiction and drug-abuse prevention programs, both overall and by participating agencies.

Federal 8(a) Program—Discusses the new rules relating to minority- and woman-owned businesses, and their direct effects on federal IS procurements, including subcontracting relationships.

GSA Schedule Practices—Analyzes new GSA policies on dealers, schedules, cost and pricing data, as well as providing business volumes in various schedule categories.

BRIEF UPDATES

As part of the 1991 subscription, INPUT will update the market analysis, forecast, and opportunity lists for the following INPUT market reports, published in either 1989 or 1990:

- *Federal Electronic Data Interchange Market*
- *Defense Logistics Agency Information Systems Market*
- *Federal Processing Services/Systems Operations Market*
- *Federal Computer Equipment Maintenance Market*
- *NASA Information Systems Market*
- *Federal Office Information Systems Market*
- *Federal Computer Security Market*

INPUT®

Federal Information Systems and Services Program

SERVICES

Telephone Inquiry	The "hotline" inquiry service provides fulfillment of short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data. It handles FOIA requests (at nominal additional fees).
Consultant Access	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
Client Conference	This two-day conference, free to INPUT FISSP clients, presents leading agency and vendor executives speaking on different topics revolving around a common theme.
Client Meeting/Breakfast	These breakfasts present findings and forecast data from a new market report, as well as enhancing client networking opportunities.
Federal Information Center	Clients have access to INPUT's Federal Information Center which houses hundreds of agency planning, budget, and procurement documents, and a wide array of government-related research sources and all other INPUT program reports.

Federal Information Systems and Services Program is available from INPUT, 1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300. Detailed description of services and fees available upon request.

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Subscription to INPUT's Federal Information Systems and Services Program:

- ☐ $25,000 if payment received *by* December 15, 1990.
- ☐ $26,000 if payment received *after* December 15, 1990.
- ☐ Market Analysis Reports only at the fee of $15,000
- ☐ Procurement Analysis Reports only at the fee of $15,000
- ☐ Automated Procurement Analysis Reports *with* the Federal Information Systems and Services Program *or* the Procurement Analysis Reports at the additional fee of $2,000

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Title ______________________

Date ______________________

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INPUT®

State Government Information Systems and Services Program

Provides state government agency procurement data as well as analysis of agency information on markets, procurement regulations, technology trends, buying values and opportunities.

WRITTEN ELEMENTS:

State Agency Profiles	Descriptions of needs, issues, requirements, policies and spending patterns, with key contacts and decision makers.
Market Analysis/Forecast	Analysis of major issues, trends, vendors and five-year forecast.
Issue Analyses	Issue and topic analyses on key subjects affecting product or market strategy as indicated by clients.
Opportunity Bulletins	Identification and description of each opportunity with up-to-date status available by "hotline."

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT's executives and consultants from meetings, mail, and telephone.
Client Conference	Covers INPUT's research and forecasts, presentations by agency and industry leaders, and network opportunities.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

RESEARCH PANEL

Participate confidentially in agency IS issues panel to obtain evaluation, needs, and comparisons.

INPUT®

State Government Information Systems and Services Program

Provides answers about trends and market opportunities in states throughout the U.S. Program information includes comprehensive spending patterns, decision makers, buying values, and opportunities.

BENEFITS

INPUT's State Government Program will help you:

- Capture new state market opportunities
- Understand the impact of market changes
- Support state government market strategy
- Be aware of key trends and issues
- Understand individual agency needs and policies

PROGRAM DESCRIPTION

STATE AGENCY SERVICE PROFILES

Comprehensive profiles of information systems needs, requirements, issues, trends, policies, and spending patterns of major state agencies and departments. Each profile identifies key decision makers, information systems procurement policies, and key contracts.

MARKET ANALYSIS/FORECAST SERIES

An ongoing series of analyses, beginning with a review of the industry the previous year. Analyses performed and delivered throughout the year will include major issues, trends, leading vendors, and a comprehensive annual forecast for the coming five years. Each report will be updated annually, to ensure year-to-year comparison and comprehensive, up-to-date data.

ISSUE ANALYSIS

Issue and topic analysis reports will be prepared on subjects that clients indicate are of key interest. Each report will deal with a single topic or issue that could affect an organization's products or market strategy. Issues could include the impact of federal budget reduction on federally funded projects or whether states will adopt the federal telecommunication standards.

OPPORTUNITY BULLETINS

Opportunity bulletins will be prepared for each opportunity identified during the course of research about state agencies. Once identified, information about the status of the opportunity will be available to clients through INPUT's hotline support service. Opportunity bulletins will be released as they are identified.

INPUT®

State Government Information Systems and Services Program

SERVICES

Telephone Inquiry	The "hotline" inquiry service provides fullfilment of short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.
Consultant Access	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
State Systems and Services Conference	Two-day conference covers INPUT's state market research. Expenditure forecasts are presented together with presentations by state government and industry leaders on trends, policies, and methods.
Information Center Access	Clients have access to INPUT's information centers which provide extensive information about opportunities and about companies providing services to state governments.

State Government Information Systems
and Services Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees available upon request.

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INPUT®

Software and Services Market Analysis Programme—Europe

Provides reliable information on European software and services markets to enable executives and managers to plan effective marketing strategies for the future.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed.
Research Bulletins	Issued on research in progress

TYPES OF ANALYSES:

Market Reports	Analysis and forecasts of user expenditures in European software and services markets
Industry Sector Reports	Examination of issues, trends and opportunities in software and services in the most important industry sectors
Topic Reports	Research on critical issues in the software and services market

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry
Consulting Support	Provides continuous support, such as reactions, opinions and ideas
On-Site Visit	Presentation of research results and discussion of issues at client's premises
Client Meetings	Informal presentations and discussion of research results

Software and Services Market Analysis Programme—Europe

INPUT®

INPUT's Market Analysis Programme provides you with detailed information so you can make informed decisions about your company's future strategy.

An annual subscription answers many of the information needs of company executives in the software and services industry. INPUT has been active in Europe for nearly ten years and has built—and is constantly updating—a large database of industry and user information.

BENEFITS

The need for accurate market information

Executives need a regular source of reliable information, structured in such a way that it can be applied directly to their own businesses. INPUT's Market Analysis Programme can provide this information to help executives plan for the future direction of their companies.

One of the major strengths of INPUT's research programmes is the European coverage. Clients will be able to find out how markets are developing in each European country as well as gain valuable insight into the overall European market—essential knowledge for conducting business in the 1990s.

Clients can learn:

- Where the best opportunities are for their products and services
- Competitive information
- Market size and growth rates
- Driving and inhibiting forces
- Issues and trends
- Emerging opportunity areas

All of these enable the client to focus sales and marketing efforts.

The European software and services industry is a rapidly changing, fiercely competitive and complex environment. In order to succeed in such a market, executives are under increasing pressure to have detailed information about their company's target markets. With over 30,000 companies participating in the European software and services market, serving many industry sectors and delivering many different products and services, this is a difficult and time-consuming task. INPUT can help make this task easier and therefore less costly.

INPUT®

Software and Services Market Analysis Programme—Europe

PROGRAMME DESCRIPTION

MARKET SECTOR REPORTS

The Western European Market for Computer Software and Services, 1991-1996—This report summarises the market forecasts for the software and services sector, including: applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration. It provides market sizes for 1990, with forecasts for 1991-1996, and also provides a country breakdown of the market. Each delivery mode is segmented into subsectors.

Processing Services Opportunities—Western Europe, 1991-1996—There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors to understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunties available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities—Western Europe, 1991-1996 —This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their strengths and weaknesses. The report identifies leading vendors, providing valuable competitive information.

European Software Applications Solutions Opportunities, 1991-1996—This report forecasts the size of the applications solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for vertical market products, cross industry market products, application software products and turnkey systems. It discusses market issues, such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

Systems Software Products—Western Europe, 1991-1996—This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends such as the move towards distributed processing and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

Software and Services Market Analysis Programme—Europe

INPUT

INDUSTRY SECTOR REPORTS

European Software and Services Market, 1991-1996 —Insurance Sector—In the insurance sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces in the market for software and services in this sector. Software and services vendors in this sector can gain an accurate overview of the European market for their services in the insurance sector.

European Software and Services Market, 1991-1996—Banking and Finance Sector—INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report contains detailed market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

European Software and Services Market, 1991-1996—Discrete Manufacturing Sector—INPUT's discrete manufacturing sector report evaluates the impact of trends in the manufacturing sector on the software and services market. Software and services vendors active in the manufacturing sector will find that this report provides them with detailed market forecasts, and identifies the leading vendors and the key opportunities available. The report can make a valuable contribution to vendor companies' strategic planning.

European Software and Services Market, 1991-1996— Process Manufacturing Sector—This companion volume examines the issues and trends in the process manufacturing sector and assesses their impact on the software and services market. The report will help vendor companies, and those considering entering the market, to plan their future strategies by providing detailed five-year market forecasts and identifying the key opportunities available.

European Software and Services Market, 1991-1996—Retail and Wholesale Distribution Sector—This report analyses the market for software and services in the distribution industries of Western Europe. Software and services vendors can find out what the major trends, issues and opportunities are, and are provided with market forecasts for wholesale and retail activities in France, Germany, Spain, the U.K. and the rest of Europe.

Software and Services Market Analysis Programme—Europe

INPUT®

TOPIC REPORTS

Education and Training—This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services to assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Software Applications Maintenance—This report examines the specific area of user-written software application maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities—UNIX has become an important operating system as suppliers move away from their own proprietary systems This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues—As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them quickly to acquire market penetration into new countries, or to be able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity.

RESEARCH BULLETINS

Regular bulletins, produced during the research projects, alert clients as quickly as possible to trends and developments. They are also used for communicating market forecast data as it becomes available.

Software and Services Market Analysis Programme—Europe

INPUT®

SERVICES

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- Information on competitors (brochures, revenues, subsidiaries)
- Lists of companies in a particular country offering CASE tools
- What factors influence the choice of location of an IS company's headquarters?
- What effect will the merger between company x and y have on my business?

Consultant Support

INPUT's experienced consultants are always available to give opinions and, reactions to events, and for ideas.

On-Site Visit

INPUT consultants can present and discuss research findings at the client's site, so that clients can relate the research results to his own circumstances. The clinet can raise specific issues and interests in complete confidence, away from your competitors.

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Network Services Market Analysis Programme—Europe

INPUT®

Provides market size data, analysis of issues and trends and identification of new opportunities in EDI, electronic messaging, network management and other network-based services.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed, then delivered as a complete, bound, report.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES:

Market Report	Analysis and forecast of user expenditure in the European network services market.
Topic Reports	Examination of issues, trends and opportunities in specific sectors of the network services market.
User Issues Report	Analysis of the network service market from the users' viewpoints.
Vendor Report	Profiles of European network services suppliers and their market positions.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as reactions to events, opinions and ideas.
On-Site Visits	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Presentations and discussion of research results.

INPUT®

Network Services Market Analysis Programme—Europe

An annual subscription to INPUT's network services programme provides executives and managers with the data and analysis they need to plan future directions for their companies. The research programme examines topical issues, such as deregulation of telecommunications carriage in Europe, and also highlights opportunities for vendors in new, emerging areas.

Five-year market forecasts are provided, together with discussion of issues and trends in the market and differences among European countries.

BENEFITS

Clients of INPUT's Network Services Market Analysis Programme can find out about trends and developments across Europe in this specialised sector of the software and services market.

This market is changing rapidly, as new trends emerge and businesses place even greater reliance on their computer systems and the communication links between them. To be at the forefront of this fast-moving market requires detailed knowledge of market sizes, specific opportunity areas and country market differences. An annual subscription to INPUT's Network Services Market Analysis Programme provides executives in the network services industry with the data and analysis needed to make informed, strategic decisions.

Information such as the following enables executives to plan marketing strategies to boost sales revenues:

- Competitive information
- Market size and growth rates
- Driving and inhibiting forces in the market
- Emerging opportunity areas

INPUT's carefully constructed research programme provides a mix of written documents, presentations, meetings and telephone support, so that you can, in effect, extend your marketing department.

Network Services Market Analysis Programme—Europe

INPUT®

PROGRAMME DESCRIPTION

MARKET REPORT

The Western European Market for Network Services, 1991-1996—This report provides an analysis and forecast for the network services sector of the European network services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures as well as market share analysis and profiles of leading vendors.

TOPIC REPORTS

Western European EDI Developments, 1991-1996—This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors and identifies the challenges that vendors are likely to face over the next five years, such as the need to be able to offer an EDI service which handles all classes of networks on an end-to-end basis.

Financial Network Services—Western Europe,1991-1996—This report examines the new opportunities that will result from the proposed deregulation of telecommunications carriage. The market is becoming more competitive as a result of new players entering the market, so it is even more important for vendors to be knowledgeable. This report provides a complete overview of the current market environment and can make a valuable contribution to strategic planning activities.

Opportunities in ISDN and Other Emerging Technologies in Western Europe, 1991-1996—Continuing developments of telecommunications technology will open up new service opportunities for network services vendors in an increasingly competitive environment. However, user inertia and the complexities of network use present very real difficulties for both users and vendors in fulfilling their potential. This report explores the dynamics of this situation and provides insight into the most profitable market opportunities and the ways they can be exploited.

USER ISSUES REPORT

User Issues in Network Services Markets—Western Europe, 1991-1996—This report examines the network services market from a user viewpoint. It discusses the issues that concern users and analyses their requirements for network services over the next five years. As networks are playing a more critical role in users' information systems, users' demands and expectations are increasing. It is vital for suppliers of network services to understand the changes that are taking place in the market.

Network Services Market Analysis Programme—Europe

INPUT®

VENDOR REPORT

Western European Network Service Provider Profiles—This report contains profiles of leading European network service providers. The profiles provide vendors with valuable, strategic information on their competitors by describing each company's products and services, listing geographic markets served and giving a history of merger and acquisition activity. The profiles also give a five-year financial analysis of each company's revenues and a description of the company's business strategy.

RESEARCH BULLETINS

Regular bulletins, produced during the research projects, alert you as quickly as possible to trends and developments. They are also used for communicating market forecast data as it becomes available.

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Consulting Support	INPUT's experienced consultants are always available to give opinions, reactions to events, and for ideas.
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Systems Management Outsourcing Programme—Europe

INPUT®

Provides information on European systems integration and systems operations markets.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed.
Systems Integration Reports	Market forecasts, vendor strategies, marketing and user-related issues and specific technology opportunities for the European systems integration market.
Systems Operations Reports	Market forecasts, vendor strategies, marketing and user-related issues and specific technology opportunities for the European systems operations market.
Research Bulletins	Issued on research in progress.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as consultant's reactions to events, opinions and ideas.
On-Site Visits	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

Systems Management Outsourcing Programme—Europe

INPUT®

SOFTWARE AND SERVICES MARKETS

An annual subscription to INPUT's Systems Management Programme of research enables executives and managers involved in marketing their companyies' systems integration and systems operations (facilities management) capability to be well-informed about the trends in the industry. Vendors need to be aware of what the user issues are, and need to have a thorough knowledge of what the competition offers.

BENEFITS

INPUT's programme of research examines the two related areas of systems integration and systems operations. Although these two markets are relatively small, they are among the fastest growing in the software and services industry. It is especially important to find a reliable source of data about these markets. INPUT's Systems Management Programme clients benefit from INPUT's expertise in this specialised market sector. Clients of the programme can find out:

- How vendors are structuring to be best placed to win systems integration contracts
- How vendors are responding to the need to provide a more complete service
- The effect of skills shortages and new technologies
- What criteria users employ to select a vendor
- Vendor market share
- Market size and growth rates

The research provides systems integration vendors with advice and recommendations on how to be successful in these markets, covering issues such as risk assessment and management, alliances and partnerships. It also provides detailed market forecasts by European country and by industry sector.

The 1990s will see an increase in the requirement for systems integration and systems operations, and INPUT's Systems Management Programme will ensure that vendor companies are equipped to compete successfully in this market.

Systems Management Outsourcing Programme—Europe

INPUT®

PROGRAMME DESCRIPTION

SYSTEMS INTEGRATION REPORTS

Systems Integration Market Analysis and Forecast—Western Europe, 1991-1996—This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. The report provides valuable insight into the current market environment and can assist companies with their strategic planning activities.

Vendor Alliances and Strategies in Western European Systems Integration Markets, 1991-1996—This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. Bidding for systems integration contracts carries a potentially high risk factor, and the report examines vendor strategies for reducing this risk. It also discusses how vendors are forming alliances to gain the necessary expertise to bid successfully.

Marketing Issues in Systems Integration Markets—Western Europe, 1991-1996—This report examines the systems integration market from a user's viewpoint, to enable companies operating in systems integration markets to better satisfy their clients. The report investigates the major issues in industry markets that are leading users to offer systems operations contracts, and examines user issues and concerns about selecting a vendor.

Imaging Opportunities in Western European Systems Integration Markets, 1991-1996—This report examines opportunities in this exciting, emerging technology. Now that pictures, photographs and film can be stored electronically, a plethora of opportunities is arising for integrating such technology into users' information systems. Computerised personnel records can store photographs and banks can store copies of cheques, for example. This report sizes the market for imaging systems and identifies leading vendors active in the market, providing valuable competitive information for companies involved in, or considering entering, the market.

Systems Management Outsourcing Programme—Europe

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SYSTEMS OPERATIONS REPORTS

Systems Operations Market Analysis and Forecast—Western Europe, 1991-1996—This report examines the demand and market forces in each European country market. Leading vendors are identified and their market shares are listed. The report also identifies the impact of systems operations on other markets in the software and services industry. The report provides valuable market size data and competitive information for European companies involved in, or considering entering, the systems operations market.

Vendor Alliances and Strategies in Western European Systems Operations Markets, 1991-1996—This report examines the trends affecting systems operations markets from a vendor point of view. It discusses the main issues of bidding for, and managing, systems operations contracts, and identifies the necessary vendor skills. This report is of value to companies already active in the market, and can also assist those outside the market to understand the effect of trends on their own activities.

Marketing Issues in Western European Systems Operations Markets, 1991-1996—This report identifies user attitudes, and assesses their significance for systems operations vendors. The report examines, from a user's point of view, the main issues in contracting out the operations of an information system. The report analyses these user attitudes, and systems operations vendors can benefit from INPUT's recommendations for vendor marketing strategies.

Network Management in Systems Operations Markets—Western Europe, 1991-1996—Computer systems today almost inevitably involve some networking facilities. This presents particular niche opportunities for systems operations vendors to manage the network on behalf of the user. This report examines the opportunities available in this market, discusses user requirements for network management and assesses the skills that vendors need to be able to offer in order to enter the market.

RESEARCH BULLETINS

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Systems Management Outsourcing Programme—Europe

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SERVICES

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- Which are the fastest growing country markets?
- Who are the top five systems integrators in Finland?
- What are the key forces driving the systems integration market in Spain?

Consulting Support

INPUT's experienced consultants are always available to give opinions and reactions to events, and for ideas.

On-Site Visits

INPUT consultants can present and discuss research findings at the client's site, so that the client can relate the research results to his own circumstances. The client can raise specific issues and interests in complete confidence, away from competitors.

Client Meetings

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INPUT®

Information Systems Customer Service Programme—Europe

Provides data, analyses and strategic intelligence on customer services issues and markets. It particularly focuses on rapidly developing new service opportunities for customer services organisations.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES

Market Analysis Reports	Analysis and forecast of user expenditures across the European customer service and independent maintenance markets.
User Trends and Issues Reports	Examination of user issues and trends and levels of satisfaction with customer service.
Professional Services Reports	Discussion and analysis of important opportunities for customer services vendors, such as systems operations, consulting, systems integration and disaster recovery.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as consultant's reactions to events, opinions and ideas.
On-Site Visit	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

INPUT®

Information Systems Customer Service Programme—Europe

INPUT has been tracking the customer service market in Europe since 1979. Through constant contact with vendors and users, INPUT is able to help customer service executives decide upon the future directions that their customer service organisations should take.

INPUT researches the customer service market annually and provides information on hardware and software maintenance and also focuses on nonmaintenance business activities, such as professional services.

BENEFITS

Subscription to INPUT's Customer Service Programme provides clients with timely information about customer service markets to enable executives to plan effective marketing strategies for the future.

INPUT can help clients:

Size the market

- Target high-growth sectors
- Identify competitors
- Position their organisations against the competition
- Find out how satisfied their clients are with the service you provided
- Formulate effective pricing strategies

THE CHANGING ROLE OF THE CUSTOMER SERVICE DEPARTMENT

Customer service departments can no longer afford to rely on equipment maintenance revenues alone as this revenue stream slows. New revenue-generating businesses must be developed out of the growing needs of users for fuller system support services.

To restructure a large customer service organisation, to enable it to branch out into nontraditional maintenance businesses, is no easy task. Customer service executives need to identify alternative markets and need to consider the implications of entering these markets, for example:

- Are new skills required?
- What organisational changes are needed?
- Who will our competitors be?
- How should we price our service?
- How do we market our service?

INPUT's Customer Service Programme can assist executives in answering these questions in the European market.

Information Systems Customer Service Programme—Europe

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

Western European Customer Services Market Analysis and Forecast, 1991-1996—This report surveys the market for customer services and forecasts user expenditures on equipment and systems software maintenance, professional services and education and training associated with equipment and systems software. The report enables customer service executives to size the market and gain valuable knowledge about differences among countries, and differences in spending among various market sectors.

Independent Maintenance—Western Europe, 1991-1996—Independent maintenance vendors are still gaining market share, but as service revenues from equipment maintenance decline, independent vendors face the challenge of creating alternative, higher-growth revenue streams. This report is crucial for independent vendors and equipment vendors to gain valuable competitive information and an informed view of the future market directions for independent maintenance companies. The report profiles leading independent maintenance companies, sizes the market and discusses market penetration trends.

USER TRENDS AND ISSUES REPORTS

Customer Service in Western Europe, 1991—User Satisfaction Analysis—This set of three reports, covering large systems, medium systems and PCs and workstations, gives customer service executives valuable data on user satisfaction. In 1990, INPUT surveyed well over 1,000 users in Europe. The reports allow vendors to make comparisons with other vendors' ratings, overall European ratings and also allow for comparisons with the previous years' results.

Customer Service in Western Europe, 1991-1996—User Issues—This companion set of reports builds upon INPUT's extensive user research to highlight issues in European customer service. These three volumes cover large systems, medium systems and PCs and workstations, and they provide analysis on clients' attitudes and concerns. The reports provide valuable evaluation of the issues, and give advice and recommendations to vendors based upon the European survey of over 1,000 customer service users.

INPUT®

Information Systems Customer Service Programme—Europe

PROFESSIONAL SERVICES REPORTS

Environmental Services for Western European Customer Services Vendors, 1991-1996—This report can assist customer service organisations that are already involved in providing environmental services or that are considering entering the market. Many customer service vendors are broadening their service portfolios, offering services such as structured wiring, air conditioning and power sources. This is creating an important alternative revenue stream. The report can help vendors consolidate their positions by defining and sizing the market and discussing the opportunities available. User and vendor issues are discussed.

Systems Operations for Customer Service Vendors in Western Europe, 1991-1996—As a high-growth area, this market provides customer service vendors with an opportunity to regain some of the lost revenues caused by a slowdown in the growth from equipment maintenance revenues. The report sizes the market in Europe and identifies vendors already active in this area. It recommends strategies for vendors to enter the market and contains discussion on user issues, so that executives can target the opportunities effectively.

Channel Support Issues in Western European Customer Services, 1991-1996—As more and more sales are derived from indirect channels, important issues are raised. One major concern is that the VARs, dealers and distributors are selling equipment without necessarily having the expertise to support it. This often results in users becoming isolated from the equipment vendors. This report will assist equipment vendors and third-party organisations to avoid some of the pitfalls in supporting their users, and recommends strategies for increasing user satisfaction with service.

Software Support Issues in Western European Customer Services, 1991-1996—Customer service vendors need to extend their levels of software support as they widen their portfolio of services. This report examines the issues of providing full software support for both systems and applications software. The report can help customer service organisations to plan their future strategies for providing full software support by discussing the skill requirements needed, user expectations, and the future direction of software support services.

SERVICE UPDATE

Service Update is a monthly newsletter that tracks developments in the customer service industry. It keeps customer service executives up-to-date with trends in the industry and provides valuable competitive information.

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Information Systems Customer Service Programme—Europe

RESEARCH BULLETINS

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SERVICES

Enquiry Service

Clients can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- The size and five-year growth of the U.K. hardware maintenance market in real terms (excluding inflation), divided among large, medium and small systems.
- The market penetration of vendor-provided environmental planning services across various market sectors in Western Europe.
- The range of software support services provided by company x.

Consulting Support

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On-Site Visits

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1/91 Service Update
EDI Reporter

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A Monthly Publication from INPUT's **EDI Program**

Vol. 6 No. 1 January 1991

IN THIS ISSUE:

EDI and Taxation

Perhaps in 10 years, we will receive an electronic 1040 in our electronic mailboxes the day after Christmas. And then, come midnight April 15, network transmission volumes will peak as taxpayers zap their returns in at the last minute.

The mechanisms to make this scenario come to pass are being installed now.

A number of EDI data formats are now available, or will be shortly, to facilitate the filing of tax information and the payment of taxes with electronic funds transfer (EFT).

The main work to date consists of:

- The creation of a standardized notes segment (the TXP) that can be attached to an ACH CCD+ format. The TXP with a CCD+ allows corporations to pay state taxes electronically. The TXP structure, developed using X12 syntax, specifies the taxpayer's identification number, what tax is being paid, the period of time that the tax is being paid for, and how much is being paid (with a breakout of the dollar amount applied to tax, penalty, and interest).

- The creation of the X12 826 transaction set, the tax information reporting format. Government agencies use this to exchange information for tax purposes. For example, Social Security, Veteran's Administration, and welfare agencies communicate information about an individual's tax status.

Continued on next page

Taxation . . . from page 2

- The work on the X12 813 format, the electronic tax return. The format, under development by task group 3 of the ANSI X12 Finance Committee, is a generic tax return for state, federal and local governments. For individuals, it would be used by a tax preparation service (not directly by individuals). It is designed not just for individual income tax, but for all kinds of taxes: corporate income tax, license taxes, sales and use taxes, withholding taxes, motor fuels taxes, alcohol taxes, bingo taxes, mineral reporting taxes, etc.

- A recent pilot project by the Internal Revenue Service where corporations paid Federal Tax Deposit (FTDs) electronically. FTDs are those portions of employee paychecks that are witheld by the government.

Exhibit A diagrams EDI and EFT data flows for tax payments.

Seventeen states currently allow corporations to pay taxes electronically, according to the **Federation of Tax Administrators** (Washington, D.C.). Exhibit B shows the status of state EFT programs. Given the number of states considering electronic payment options, the Federation estimates that as many as 35 states will be using EFT in the next two to three years.

To date, states with an electronic tax payment option have a payment threshold for determining which corporate taxpayers should file via EFT. The most

Exhibit A

Formats Involved in Taxation

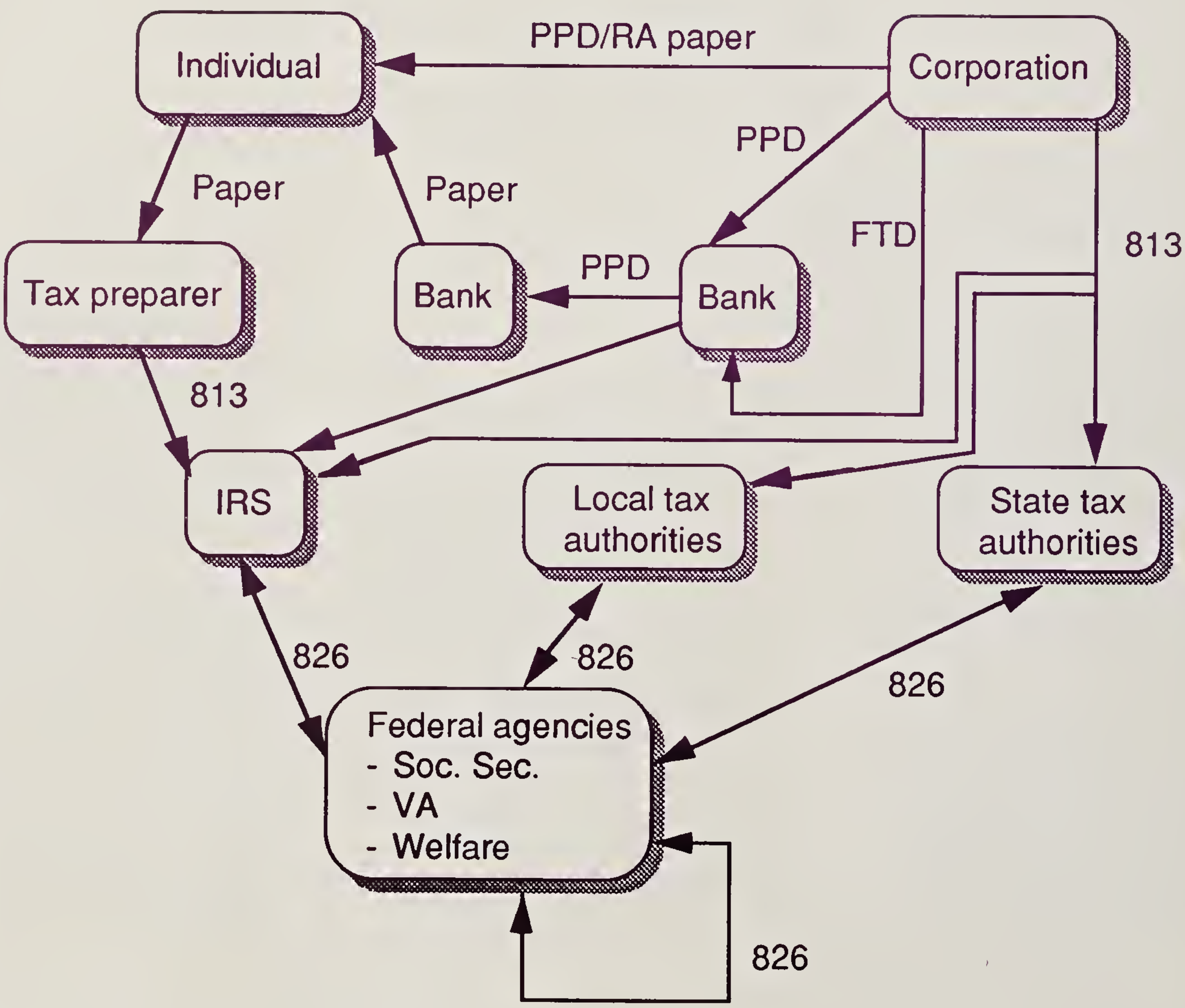
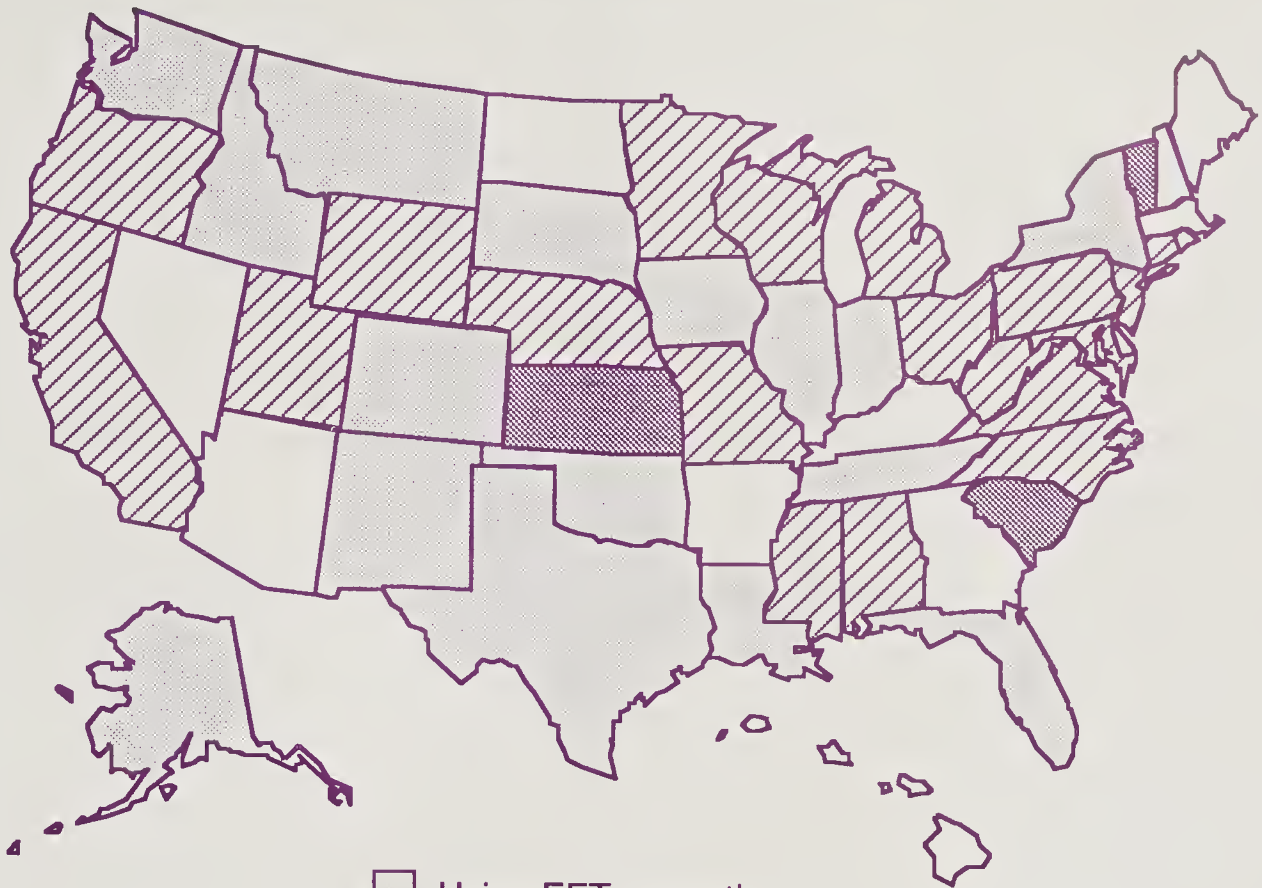


Exhibit B

Status of State EFT Programs



- Using EFT currently
- Planning/studying EFT
- Enabling legislation adopted
- No current EFT plans

Source: Federation of Tax Administrators, September 1990

common threshold in use is where the payment exceeds $20,000 or where the average liability per tax period is $20,000 or greater.

Tax payments may be the fastest growing segment of the electronic payments market for the next several years. Electronic trade payment between corporations, by contrast, is growing more slowly than expected, hampered by user difficulty in integrating systems, the slow pace of EDI adoption in general, concern over float issues (usually unwarranted), and infrastructure fragmentation in the banking industry. For further background, please refer to the new INPUT report, *Developments in Corporate Electronic Trade Payments.*

Tax payment may be adopted faster than trade payments because it requires less system investment and operational expense from the corporation. For example, using a debit payment mechanism (see below), corporations merely make a toll-free telephone call to the state authority to initiate a payment. The authority is responsible for enacting the funds transfer through the banking system. Furthermore, tax authorities are adopting a proactive stance toward electronic tax payments, offering

Continued on next page

Taxation. . . from page 3

educational programs, hotline-support bureaus, and other measures that streamline the steps that corporations will take to participate.

In addition, electronic methods to pay recurrent, same-sum tax payments (as in employee payroll taxes—FTDs) are easier to implement than variable-amount corporate payments.

As history has demonstrated, government involvement in new technological horizons has often been the critical ingredient that legitimizes and subsidizes the technology for the private sector. The federal government's use of the ACH to make Social Security payments was the predominant application of the ACH for the first ten years of its existence. Corporate electronic payment may get its jump-start as governmental bodies—federal, state, and local—promote EDI/EFT as an option to pay a variety of taxes.

Source: Robert Barr, South Carolina Tax Commission, 803-737-4689

Document: The Use of Electronic Funds Transfer for State Tax Payments, A Report with Recommendations. October 1990. Research Report No. 134. Federation of Tax Administrators, Washington, D.C. 202-624-5894. ■

Debit Payment Mechanism Growing in Popularity

Although defying the basic human concern of keeping other hands from touching one's own pile of cash, corporations and tax authorities are seeing that the EFT debit method may be more effective and desirable than the credit method for making payments.

The difference between the two methods is determined by who sets the interbank funds transfer mechanism in motion—the company owing the money or the company (or tax authority) owed the money. With the credit mechanism, the owing company initiates the funds transfer, whereas with the debit mechanism, the company owed initiates the transfer.

With the credit mechanism, the owing company (after receiving an invoice or anticipating a tax deadline) sends an instruction to its bank to move funds to the owed company's bank. With the debit mechanism, the *owed* company sends an instruction to its bank telling it to collect funds from the owing company's bank. It may, in fact, communicate directly with the owing company's bank, telling it to transfer funds. In any case, a debit is when the owed company and its bank essentially "request" funds, as opposed to a credit, when the owing company and its bank "offer" funds.

The use of electronic payments may get a boost if more corporations adopt the debit mechanism, according to a number of pioneer users of electronic payments. Adoption of electronic payments by corporations has a built-in disincentive because most corporations are not yet willing to invest in systems that enable them to increase the speed and efficiency by which they disburse money. The old-fashioned way of paying with paper checks is psychologically more reassuring. However, if the expense of electronic payments is placed on the receiver of the funds, adoption may accelerate. The recipient, by contrast, is willing to pay to get its money faster.

Debit mechanisms are favored by selling companies and tax authorities because, being the ones that are owed money, they have the built-in incentive and are therefore willing to manage the process of getting their deserved funds delivered to them. Furthermore, they absorb all the transaction costs of the funds transfer (bank and network fees, and other software and systems costs).

All 17 states that offer electronic tax filing offer the debit mechanism (along with the credit

mechanism). Instead of the taxpayer notifying its financial institution to initiate the payment (as in the credit mechanism), the taxpayer notifies the state. The state, through its bank, then initiates the transaction through the ACH network to debit the taxpayer's account and credit the state's account a like amount.

All 17 states, at this point, have contracted for the services of a third-party vendor in processing debit transactions. With this arrangement, the taxpayer contacts the state's vendor (usually through a toll-free telephone call) and provides certain information involving the tax being paid, payment amount, taxpayer identification number, and other tax information. The vendor then initiates the transaction through a financial institution into the ACH system. The vendor also supplies the state with the information obtained in the phone call from the taxpayer so that it may update its taxpayer accounting and other systems. This may be provided on tape or electronically.

Advantages of the debit mechanism are the following:

- The chief advantage of the debit mechanism is that the obligation and hassle of initiating the funds transfer is placed on the entity that is owed the money. Once it has made the authorizing telephone call or communication, the paying company has nothing else to do. The receiver of funds is responsible for all action and the successful completion of the transaction. The paying company's exposure for late payment penalties in the event of a failed transaction or some other error is therefore limited, as well, provided the initial authorizing phone call is made on a timely basis.

- Costs for a debit transaction are borne by the collecting (selling) company, not the paying company. With the credit transaction, the paying company must pay bank processing fees and telecommunication/VAN fees.

- Debit payments are less prone to errors than credit payments. On a debit payment, billing or tax statement data is transmitted via a value-added network to the paying company; therefore, error correction and editing routines can be performed on it before it is sent into the banking/payment system. Credit transactions, however, generally enter the payment system without any such editing. (Addenda records are created by the paying company and sent directly to its bank, which then enters it into the ACH.) Credit transactions are therefore somewhat prone to error, and reconciling them can increase labor costs.

Potential disadvantages of the debit mechanism are the following:

- The buying company perceives that its account can be debited without its authorization. This does not have to be the case when every debit must have an auditable authorization communication before it is enacted.

Tax authorities, consumer billing at utilities, and a few corporate-to-corporate EDI/EFT programs have adopted the debit payment mechanism. Still, credit mechanisms are the common form of EDI/EFT today. ■

Consumer Use of the Debit Mechanism

Three-and-a half percent of the customers (39,550) of **Public Service Company of Colorado** (the state's power utility) pay their monthly bills electronically. Using the Prearranged Payment and Disbursement (PPD) data format of the National Automated Clearinghouse Association (NACHA), power consumers have their checking or savings accounts debited each month for the amount owed. Unlike other uses of the PPD for consumer payments (for insurance premiums), the power payments vary in amount from month to month. Consumers are still sent a paper statement each month and have seven days in which to stop the automatic withdrawal if they disagree with a billing. The payment program, called ZipCheck, is a marketing package developed by Pittsburgh National Bank and made available to its customers to help them promote an EFT program. ■

EDI 1990: Year in Review

Grouped by topic, the following were key developments in the EDI marketplace during 1990.

New Product Innovations

Event-Driven EDI—the sending, receiving, and processing of EDI transactions (such as purchase orders, inventory inquiries, etc.) immediately, when they happen, as opposed to saving them up in batches to be processed once or a few times per day. Vendors with this new kind of product are **Sterling Software** in cooperation with **American Software** (Atlanta, GA), and **American Business Computer**.

Customer-Originated Electronic Payments—a network service from **GE Information Services** that allows a corporation to electronically collect payments from its customers. Paying companies can send proprietary formats to, or interconnect via dumb terminal with GEIS. GEIS processes the information, sends payment instructions to the buyer and seller banks involved, and reports to the receiving company.

The EDI/Communications Gateway Software—a single, multipurpose switching and store-and-forward platform through which a corporation interconnects applications and networks internal and external to the company. It may support some or all EDI, E-mail, file transfer, and real-time data communications. Vendors of this software include **Sterling Software** (Gentran), **Mpact EDI Systems** (MessageWay), **Digital Equipment Corporation** (DEC/EDI), **American Business Computer**, **EDI Solutions**, **SoftSwitch**, **GEIS**, **Control Data Corporation/Lawrence Livermore Laboratories**.

EDI Data Bases—The transaction data base pioneered by **Sterling Software** was given a trademarked name, MarketQuest. **AT&T/Istel** launched Formtrac, an on-line data base that acts as an electronic, multivendor clearinghouse for office supplies. Trading partner data bases from **IBM**, **INFONET**, and **First Interstate Bank** will be made available on-line to corporate customers to let them know the EDI capability of trading partners (availability, acceptable transaction sets, software configuration, etc.) and to help them find new EDI trading partners.

Turnkey EDI Systems—**Sears**, **IBM** (QuickEDI program), and **FoodCom** launched services that **Harbinger** and **Sterling Software** had earlier developed: marketing EDI software and services to hub companies, installing EDI software with a given company's community of suppliers so that the hub and its spokes conduct business via EDI.

EDI/EFT VAN Bank Services—Alliances among third-party, value-added networks and banks proliferated early in the year. However, the alliances have not substantially impacted the slow adoption of corporate electronic payment services in 1990.

New EDI Applications/New Industries

Construction. The Construction Industry Institute (Austin, TX) released a report this year encouraging large building contractors to use EDI. A construction industry action group has been formed to develop X12 transaction sets and guidelines.

Education. The American Association of College Registrars and Admissions Officers has an EDI committee that has submitted an X12 format to DISA for the electronic exchange of student transcripts among colleges and universities. Universities in Texas and Florida are pioneering the use of EDI for this purpose.

Travel, Tourism, and Leisure. An ANSI X12 Task Group was formed this year to design transaction sets for this industry, which includes airlines, travel agencies, hotels and motels, car rental companies, cruise operators, train and motor coach companies, tour companies, museums, national parks, and computerized reservation operators. The group is developing one of the first real-time applications of EDI for use in reservation systems. The group, although an X12 Task Group, is developing its formats using EDIFACT syntax.

Media Distribution. The film and magazine publishing industries are beginning to adopt EDI transaction sets and are getting involved in the X12 standards process.

Health care. An X12 transaction set was designed this year for the submission of health care insurance claims by hospitals and health care providers to insurance companies. Already

several insurance companies and hospitals use proprietary EDI systems. The standardized format should enable a much greater number of users to attain the efficiencies of EDI.

Electronic Tax Payments. State governments launched electronic tax payment options for corporations. An EDI data format was created and sanctioned by both NACHA and ANSI X12 by which corporations can itemize the kinds of taxes paid and their amounts in an addendum to the CCD+ NACHA payment format. The Federation of Tax Administrators released a report to help state governments develop electronic tax payment programs.

Product Introductions

DEC/EDI from **Digital Equipment Corporation** (Maynard, MA). Along with a host of professional services and joint marketing arrangements with software and service companies, Digital released its EDI translation software product this year. The software is available for the entire range of Digital's VAX systems.

IBM PC QuickEDI and DataInterchange/2 from **IBM** (Tampa, FL). IBM released these two EDI translation software packages this year and completed its EDI software offering. Now it offers software for PCs (both MS-DOS and OS/2 - based) through mainframes. IBM PC QuickEDI is MS-DOS translation software and is part of IBM's sponsor program (bringing up whole trading communities around a single hub—"sponsor"—company). DataInterchange/2 is translation software that runs in the OS/2 environment.

Trading Partner from **TSI International** (Norwalk, CT). TSI International developed this mainframe-based EDI translation software on its own. Then it purchased the EDI translation software product, TranSlate, from TranSettlements Inc. (Atlanta, GA), one of the original commercial mainframe translators. The company supports both products.

MessageWay and XWay from **Mpact EDI Systems** (Livonia, MI). These two Tandem-based messaging and EDI software products are designed for high-volume, real-time interorganizational communications. Mpact, spun off of the former **Merit Systems Inc.** (itself purchased by **CAP Gemini**), originally built these for **Chrysler**. In 1990, it commercialized them for other large EDI users.

Acquisitions and Alliances

MCI bought 25% of **INFONET**, the international value-added network consortium.

AT&T bought the network services business of **Western Union** (Upper Saddle River, NJ), including its EasyLink messaging and EDI services.

TSI International (Norwalk, CT) bought all rights to the TranSlate EDI translation software of **TranSettlements Inc.** (Atlanta, GA). TSI did not buy the processing services business of TranSettlements, which has remained independent.

Sterling Software (Columbus, OH), a provider of both EDI software and processing services, bought software vendor **Metro-Mark Integrated Systems** (Roslyn Heights, NY), giving Sterling the greatest market share in the EDI translation software market.

Harbinger EDI Services (Atlanta, GA) signed agreements with **Bell Atlantic** (Arlington, VA) and **U.S. Sprint/Telenet** (Reston, VA) that allows these telephone companies to resell Harbinger's EDI switch/mailbox software platform and PC-based EDI translation package under their own label. Both telephone companies are offering EDI services.

NYNEX Corporation bought financial software vendor **Stockholder Systems Inc.** (maker of EDI/EFT software), **Lamarian Systems** (a systems integrator specializing in port-community and U.S. Customs EDI systems), and **Le Roux Pitts and Associates** (a software developer of point-of-sale and electronic funds transfer systems).

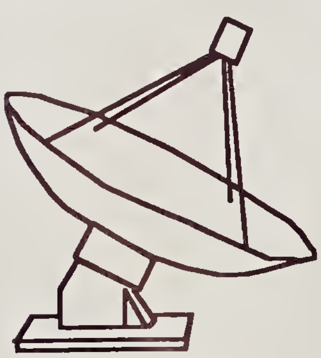
Integral Midrange, a software company based in Walnut Creek, CA, bought translation software vendor, **Wright Systems**, of Plymouth, MI.

For a comprehensive overview of the EDI market, please refer to INPUT's report, *The EDI Market, 1990-1995: Forecasts, Implementations, Trends.* ■

Is VSAT EDI an Option?

More and more large companies are using very small aperture terminal (VSAT) satellite systems to link corporate computers. Particularly, companies with many geographically dispersed facilities—such as hotels, retailers, auto dealers, and manufacturers—are finding VSAT data communications an economical alternative to terrestrial-based telecommunication networks. VSAT networks are already acting as conduits for credit card authorizations, car and hotel reservation processing, inventory advices, and product orders between manufacturers and retail outlets. It is only a matter of time before EDI transmissions use VSATs.

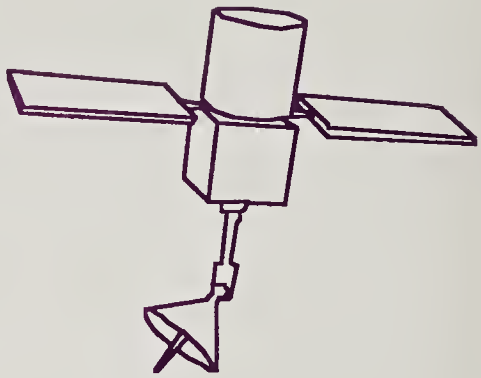
An emerging trend that EDI users and network service providers should pay attention to is the use of shared VSAT networks by companies. The shared network reduces costs to the user company, and potentially, revenues to the network provider. **The National Retail Federation** is organizing SPECNET, a shared VSAT network for specialty retail stores. **The National Automobile Dealers Association** is working out an agreement so that the existing proprietary VSAT networks of **GM** and **Chrysler** can be used by dealer franchises of other car makers, thus helping multifranchise dealerships lower communications costs.



In the case of SPECNET, a single VSAT dish would serve all specialty retailers in a single mall location. Also, SPECNET will negotiate volume discounts for equipment purchases from vendors. The network would be used by retailers for high throughput credit authorization, store polling capabilities, frequent shopper tracking, inventory look-up, price management, and electronic buying. Sharing the network allows small specialty stores to compete with high-volume merchandisers such as **Wal-Mart**, **K mart**, and **Target**, which have their own private satellite networks.

VSAT networks are also proving valuable to trucking companies that need truck location/shipment tracking systems.

Over the last 10 years, EDI network service providers have had their market eroded by new technologies, particularly in the area of software. Whereas early in the history of EDI, translation between various data formats was performed by the network, today it is mostly performed by software resident at user sites. The emergence of communication gateway software and the promise of X.400 technology accelerates the ongoing trend of companies building their own private messaging networks, again displacing the role of third-party network providers.



As value-added services migrate from VAN to user site, the VAN business is more and more a commodity, low-margin transport business. VSAT technology appears to further this trend. Users are spending less money but accomplishing more than they did with earlier data network configurations.

Leading vendors of VSAT networks include: **Tridom Corp.** (of **AT&T**), **Hughes Network Systems**, and **Contel ASC**. ■

New Law on Liability for Electronic Payments

Corporations considering adopting an electronic payment capability with their trading partners need to be concerned about systems security, particularly the transmission of payment instructions/remittance advices between corporation and bank. (Security among banks, on the ACH, has been established through many years of evolution.) Most VANs do not support encryption or

authentication services at this time. Users are advised to encrypt their payment-related transmissions when sending them over any kind of public telecommunication lines. These transmissions contain the numbers of the corporation's bank account. Unauthorized access to this data could result in a corporation's account being pillaged.

Related to security is the concern over liability: who is responsible when a payment is not executed as promised in a contract? In 1991, the UCC4A goes into effect. This law deals with the ACH credit transfers between corporations and between corporations and banks. (Other electronic transfers, including ones involving consumers, are not covered under UCC4A but rather under the Electronic Funds Transfer Act.) The importance of UCC4A lies in its statement of liability and how liability is allocated when transfers are delayed or when payment is sent to the wrong recipient.

Section 4A says the liability depends largely on the security agreement drawn up between the two parties making the transfer. Such security agreements may address passwords, message authentication, callbacks, encryption, and proper authorization. This is a significant legal requirement because in the past, many corporations have neglected such agreements.

Section 4A requires that the agreement must be "commercially reasonable." As a result, banks and VANs are required to supply security measures to their services using commercially available security systems. They will be liable if a breakdown occurs where it can be demonstrated that a lack of commercially available technology was the cause or a contributing factor. ■

EDI Software Maintenance: Emerging Market and Political Dilemma

Electronic data interchange integrates formerly isolated computer applications into a single, distributed system on two levels. Within the firm, various corporate functions (purchasing, accounts payable, receiving, etc.) are integrated. Within a company's trading community, various value-adding processes are integrated (the procurement of raw supplies, overhead supplies, transportation, etc. from suppliers and the sale of the company's products to customers).

The distributed processing software environment that results from electronically interconnecting individual application programs presents a major software maintenance challenge. INPUT views this as an opportunity for EDI market vendors.

Because multisystem synchronization is the name of the game in EDI, software maintenance is critical to EDI and it occurs in two dimensions. Software vendors must service their customers' installations to accommodate new or modified data format standards and updates to the software architecture. Trading partners must communicate changes to each other (regarding transaction sets, versions, etc.), otherwise their interconnected systems risk being disabled.

Two solutions are emerging to service the extended EDI software environment.

EDI server architecture places a single translator on a corporate network so that all functional groups using EDI can access it. This centralizes maintenance as well as eliminates costs of acquiring multiple translators.

Another solution, yet to be tried on a production scale, is remote updating by vendors over the network. Some network vendors provide both software and network service and offer turnkey management of a single large company's EDI partnerships. These vendors (**Harbinger, IBM, Sears, Sterling Software**) are responsible for synchronizing the EDI software at both the hub company and the many spoke companies. Some of these vendors are developing programs where they alter the EDI software of their customers by sending changes over the network.

Continued on next page

EDI SW . . . from page 9

For these companies, a recent event in the software business sheds an ominous light on getting such remote servicing of software off the ground.

Revlon Inc. is suing **Logisticon Inc.** after the software vendor remotely shut down its inventory software over telephone lines. Because Revlon witheld payment on a portion of a contract, Logisticon retaliated by activating computer viruses that were implanted in the inventory control software. Revlon's two main distribution centers were shut down for three days, hundreds of workers were idled, and as much as $20 million of product deliveries were halted, according to Revlon officials.

Software maintenance is a critical concern for EDI users. INPUT recommends that software and service vendors look more closely at what types of services can be offered to fill this need. INPUT cautions that maintenance is tricky due to the extended distributed software environment that results from EDI. Checks and balances, with clear designations of authority, must be spelled out regarding who can implement changes. EDI requires the collective action of vendors, trading partners, functional departments within companies, and standards groups to make systems operational. It is inevitable, as is with any collection of groups of diverse interests, that political rules and policies must be stipulated. ■

Developments in Corporate Electronic Trade Payments

Corporate use of electronic trade payments (otherwise known as financial EDI or EDI/EFT) is sparse, although over the next couple of years activity levels should rise rapidly.

In a new report, INPUT finds that the largest 1,000 companies in the U.S. are experimenting with electronic payments to or from their trading partners, including tax payments to government. Altogether in 1990, six million corporate trade payments were made electronically. INPUT expects this volume level to reach 50 million by 1995, for a compound annual growth rate in payment volume of 50%.

The increase in volume level is due to the implementation plans of existing hub financial EDI users, not necessarily from new users coming on board. Like EDI implementations, financial EDI follows a hub-and-spoke growth pattern, with large companies pushing their many trading partners to adopt.

While offering many cost-reducing efficiencies to both buyers and sellers, electronic payment between corporations faces many inhibiting market forces. Foremost is the assymetry of incentives and benefits to users. Although electronic payments can be implemented in a win-win fashion, generally it is the recipient of payment (the seller/payee) who has the incentive to change from using paper checks to using EFT, yet typically lacks the clout with the payor/buyer.

Also inhibiting growth of financial EDI is the fact that the banking industry has not yet established a uniform payment infrastructure for corporations to use. Of the 14,000 banks in the U.S., only 25 are capable of originating and receiving the electronic payment formats designed specifically for corporate trade payments. All banks can receive payment formats that have limited remittance data capacity. Nevertheless, these less sophisticated formats are being used for electronic payments. Remittance data is often sent through the Automated Clearinghouse (ACH). Although third-party networks offer services to deliver this data, corporations are not using these services for the most part. Corporations let banks, the ACH and the U.S. postal system handle the vast majority of payment traffic.

INPUT's report found that users of electronic payments alter some fundamental payment practices when they switch from checks to electronics. A buyer will make fewer but larger payments in a given

period. A corporation consolidates not only its payments, but also the number of banks it uses to disburse the payments. Often, selling companies agree to extend the payment due dates by three days to compensate for the loss of mail float. Companies that are conducting electronic payments with trading partners are typically also conducting EDI with them. Usually, EDI is implemented prior to EDI/EFT implementation.

Like other new technological systems (such as the Automated Clearinghouse), government use promises to establish and legitimize electronic corporate payments for the private sector. Programs to pay government contractors and suppliers, and state and federal programs to collect corporate taxes electronically will boost corporate acceptance of electronic trade payments.

INPUT's report on this subject is called *Developments in Corporate Electronic Trade Payments*. For more information, contact any INPUT office (telephone numbers on the back of this newsletter). ■

News Bits

A December 17 (1990) article in the **Financial Times** stated that **British Telecom** and **IBM** are in the advanced stages of a joint plan to offer a comprehensive communications service to large international companies. The planned alliance has been under discussion for two years, the article states. Such an alliance would result in the creation of the largest worldwide value-added network provider.

Catherine Hapka is leaving her position as head of **Control Data Corporation's** Data Services Division, which includes the Redinet EDI VAN. **William Miller**, CDC CFO, will assume Ms. Hapka's duties in his new capacity as head of CDC's Information Services Group. CDC president and CEO, **Larry Perlman**, will assume the duties of CFO.

Calendar

February 4-8, 1991, Hyatt Regency Embarcadero, San Francisco, CA, ASC X12 Trimester Meeting, Data Interchange Standards Association, 703-548-7005.

March 10-13, 1991, San Francisco Marriott, 1991 NACHA Conference, NACHA, 703-742-9190

March 10-15, 1991, Doral Resort and Country Club, Miami, FL, National Customs Brokers and Forwarders Association of America, Inc. Annual Convention, NCBFAA, 212-432-0050.

March 26-27, 1991, Nashville, TN, Quick Response 91, AIM USA, 412-963-8588.

*April 7-10, 1991, Palmer House, Chicago, IL, Corporate EFT/ Financial EDI Conference, University of North Carolina, Chapel Hill, Business School, 919-962-9630.

April 15-19, San Francisco, UN/ EDIFACT Joint Rapporteurs Meeting

April 24-26, 1991, Marriott's Orlando World Center, Orlando, FL, X12/DISA EDI '91, 703-548-7005

May 15-17, 1991, Jolly Hotel, Milan, Italy, ELEDIS '91, XCOMS International, 39-2-952-2102.

June 3-7, 1991, Innisbrook Resort, Tampa, FL, ASC X12 Trimester Meeting, Data Interchange Standards Association, 703-548-7005.

June 18-19, 1991, Mayflower Hotel, Washington, DC, 10th Annual International Trade and Computerization Conference, NCITD, 212-925-1400.

September 4-6, 1991, Brussels Congress Centre, Belgium, 3rd International Congress of EDI Users, International Data Exchange Association, Brussels, Belgium, 32-2-736-9715.

*September 23-27, Paris, UN/ EDIFACT Joint Rapporteurs

September 30-October 4, 1991, ASC X12 Trimester Meeting, (site to be announced), Data Interchange Standards Association, 703-548-7005.

October 7-9, Hong Kong Convention and Exhibition Centre, EDI Asia '91, Tradelink, 852-804-1033.

December 11-13, 1991, San Diego, CA, 23rd EDI Systems Conference, EDIA, 703-838-8042.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050
Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Ste. 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

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International Networking: Alex Graham
Graphics: Andrea Jeris, Calvin Wade, Cheryl Tompkins, Lynette Nguyen

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INPUT Service Update

Route:

A Publication from INPUT's **Customer Service Programme—International**

January 1991

IN THIS ISSUE:

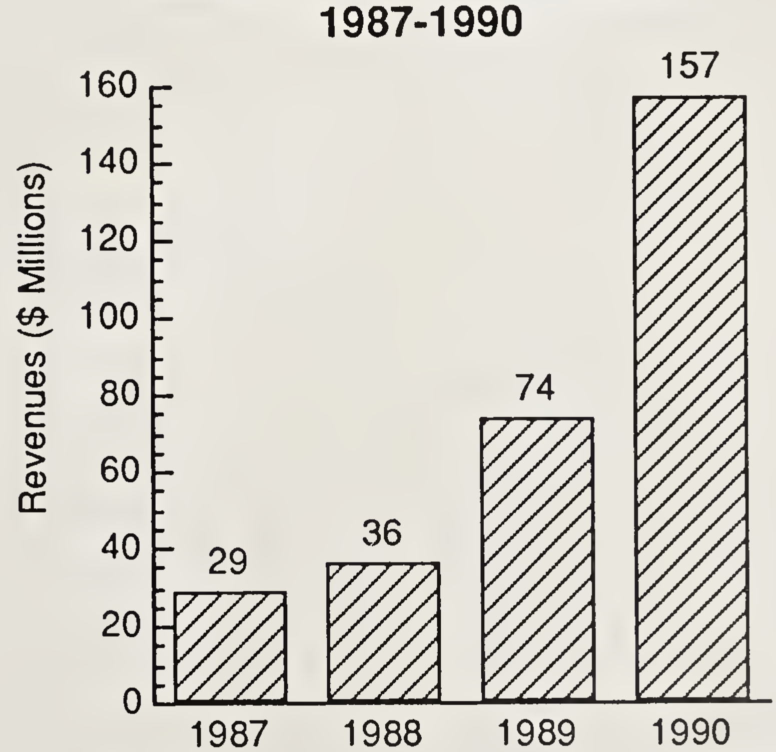
Thomainfor Revisited

In August of 1989, INPUT profiled Thomainfor, the French third-party maintenance vendor, and described the strategic direction being pursued by the company. Now, some 17 months later, INPUT is revisiting the company to discover the extent to which the strategy has been maintained.

Thomainfor, whose parent company is Thomson-CSF, was originally profiled shortly after it had acquired the European arm of Control Data's TPM operation. The news of the acquisition was released in the middle of June 1989, and it was instrumental in establishing Thomainfor as an independent maintenance provider of fully European dimensions. Exhibit A indicates the effect that the Control Data operation had on the revenues of Thomainfor. In

Exhibit A

Total Thomainfor Revenues 1987-1990



Note: Currency conversions and rounding by INPUT.

Continued on next page

Thomainfor...*from page 1*

terms of geographic coverage, Thomainfor had a very strong presence in France, and coverage in Germany, Austria, Switzerland and the U.K.

The Strategy

The strategy, as defined in 1989, primarily consisted of five components:

- Growth through acquisition. Thomainfor achieved a pan-European status largely through the acquisition of the Control Data operation, and it was made clear to INPUT that acquisition was considered to be the major engine for growth.

- Thomainfor would concentrate on establishing expertise in the maintenance of the equipment of the principal manufacturers such as IBM, Digital and Bull. However, it was intended to put special emphasis on the minicomputer sector of the market and to develop a high level of expertise in UNIX products.

- The target customer groups were defined as large or medium-sized organisations. The company clearly stated that it was not particularly keen to sign up small customers.

- In addition to the European countries in which it already had a presence, Thomainfor indicated that its longer-term goal was to establish operations in each country within the European community, with particular emphasis upon Spain, the Netherlands, Belgium and Italy in the short to medium term.

- Finally, the company stated that it was looking to achieve what it described as a "critical size"—which was defined as being a turnover of between \$6.5 million and \$8 million—in every country market that it entered.

The strategy was both comprehensive and ambitious. How far has the company progressed and to what extent have its strategic goals proved to be achievable?

The Implementation

Exhibit B illustrates the progression of Thomainfor's revenue forecasts for 1990 made during the course of 1989 and 1990, compared with the figures actually achieved, and it provides valuable insight into the company's continuing growth pattern during the year.

Growth through Acquisition

The actual 1990 revenue figure represents an increase of 52% over the initial forecast made in August of 1989. Thomainfor's revenues have increased by

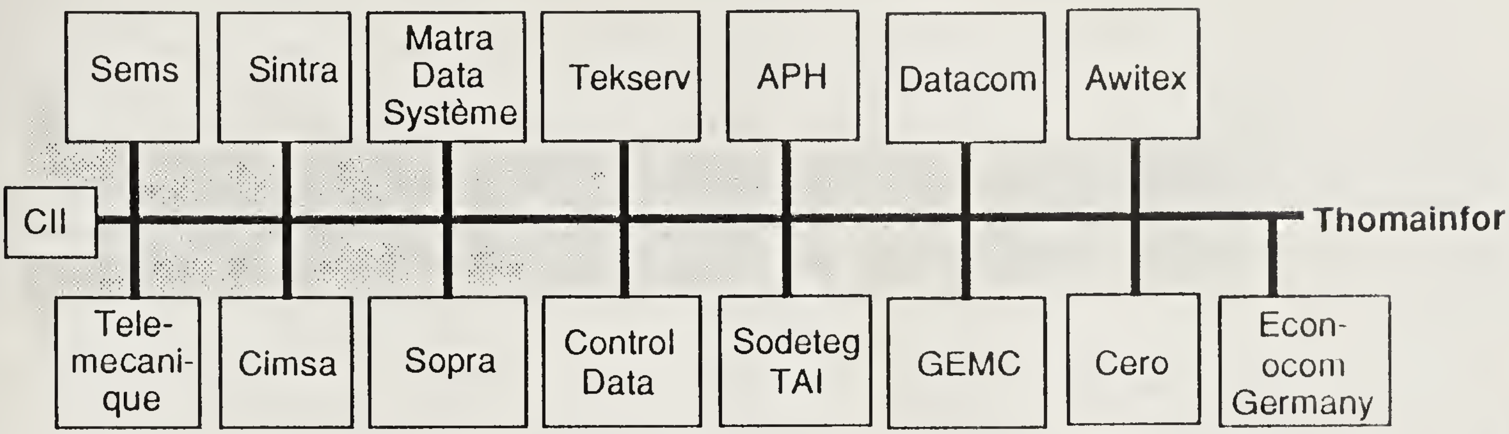
Exhibit B

Thomainfor Revenues for 1990—Forecast and Actual

Country	Date of Estimate			Actual 1990
	Aug. 1989	Jan. 1990	Dec. 1990	
France	90.0	123.7	123.7	124.1
West Germany	5.5	7.4	12.0	11.0
Switzerland	0.7	0.9	0.9	1.0
Austria	3.0	5.0	5.0	5.0
United Kingdom	3.8	4.8	4.8	4.2
Belgium	-	8.7	8.7	7.9
Spain	-	1.9	5.0	3.8
Total	103.0	152.4	160.1	157.0

Exhibit C

Thomainfor—The Constituent Companies



approximately 112% over its 1989 earnings, which can only be described as an extremely rapid rate of growth.

The number of forecasts and the scale of growth achieved can be explained by the number of acquisitions made by the company during the course of the year. Examples include Awitex and Econocom in Germany, which more than doubled the anticipated revenues of the German operation and increased the number of branch offices from 7 to 15. The French operation was strengthened with the acquisition of Sopra and Matra Datasystème, and Thomainfor gained a presence in Belgium through the acquisition of Tekserv and GEMC. The acquisition of CERO has given the company a foothold in Spain.

Exhibit C shows the acquired companies that make up Thomainfor and the full extent of the aggressive policy of growth pursued by the company.

It is clear from the pattern of purchase that the cornerstone of Thomainfor's strategic intent, to grow through acquisition, has been applied consistently and aggressively during the course of 1990.

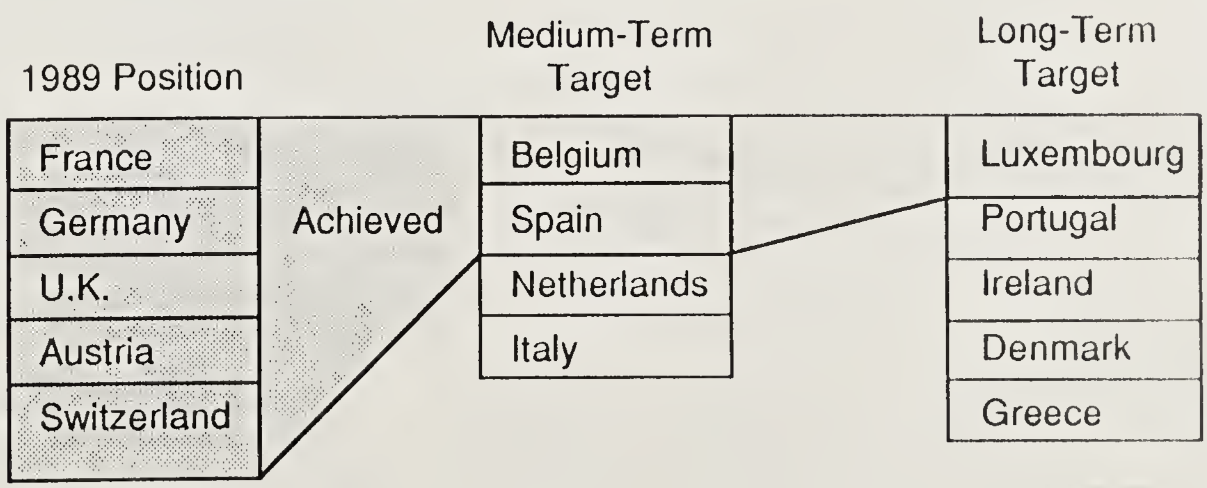
A Pan-European Company

In addition to illustrating the revenue growth of the company, Exhibit B also shows the expansion of Thomainfor's

Continued on next page

Exhibit D

Geographic Expansion



Thomainfor...*from page 3*

geographical coverage. Exhibit D illustrates the progress made in 1990 towards the stated goal of pan-European coverage.

It should be noted that the acquisition of GEMC in Belgium has given Thomainfor a presence in Luxembourg.

The growth of the company during 1990 illustrates the very considerable progress made in achieving its medium-term targets and provides a valuable illustration of the extent to which Thomainfor has sought to implement its stated strategy. However, in addition to not having covered all targeted countries, the company is some way short of achieving a "critical size" of earnings of at least $6.5 million in each of the country organisations. To date only France, Germany and Belgium have reached this goal.

Product Expertise

Exhibit E lists the major product areas in which Thomainfor currently has expertise.
The company has remained true to the product strategy as defined in 1989. Establishing expertise in workstations was made possible by the acquisition of the French company Matra Datasystème, which had expertise on the Sun workstation product range. Although these products appear to fall outside the range of activities included in the original strategy, the possession of such expertise considerably furthers the acquisition of UNIX skills.

Exhibit E

Thomainfor Product Expertise

Manufacturers	Equipment Categories	Software
IBM	CPUs	UNIX
Digital	Peripherals	VMS
Bull	Workstations	MVS
Sun	Microcomputers/PCs	GEOs 6/7
ATT	Networks	MS/DOS
All Major Minicomputer Manufacturers		PROLOGUE

The Future

Thomainfor is currently the second-largest independent maintenance vendor in Europe, behind Granada, and the largest single supplier in France. In common with other major vendors in the market, the company has achieved its position as a result of a period of intense acquisition activity.
In reviewing the performance of the company over the past 17 months, it should be noted that the implementation of the strategy has remained very true to the original plan and that considerable progress has been made towards achieving the major goals the company set for itself. Growth has been spectacular, and the company is now firmly established as one of the principal players in the market.

Two questions remain. Firstly, will the company continue to seek aggressive growth rates, supported by acquisition, in order to achieve its remaining goals? The company has yet to establish a presence in either the Netherlands or Italy and is some way short of achieving a "critical size" within the majority of its European operations. Secondly, will the constituent elements of the company be able to offer quality service and responsiveness to its customers after a period of dramatic growth and consequent change within the organisation?

In answer to the second question, it is too early to offer a judgment. Obviously, the absorption of a significant number of companies into a large and growing corporation involves change and potential dislocation, which leads to potential decline in standards of

service. Although there is little doubt that the company's dynamism demonstrates a strong will to succeed, the strength of these factors should not be underestimated. It is too early to offer a judgment on eventual success at this stage in the company's development. However, it will be instructive to watch the continuing evolution of the group.

With regard to the first question, INPUT anticipates that despite the strategic targets still to be met, 1991 will be a significantly quieter year for Thomainfor than 1990. Two factors influence this conclusion. Firstly, it is suggested that Thomainfor appreciate the need for a period of absorption to allow the newly acquired parts of the organisation to be effectively assimilated into the whole. Secondly, the current world outlook is far from conducive to a period of continuing aggressive acquisition. Although there is little reason to doubt Thomainfor will continue to pursue its strategic goals, the pace of growth is likely to slow appreciably. ■

Snippets

- **Granada Computer Services** has won a contract to service Amdahl equipment. Valued at over £250,000 per annum, the contract has been awarded by Granada Information Services. The computer services division already maintains IBM and Memorex-Telex equipment but not, until now, the Amdahl mainframes.

  Evidence is growing that U.K. local government is increasingly looking at facilities management contracts. The local government IT managers group estimates that up to 20% of councils will be exploring the use of facilities management. This data is supported by the fact that both Westminster, and Hammersmith and Fulham Councils are actively considering a move to facilities management.

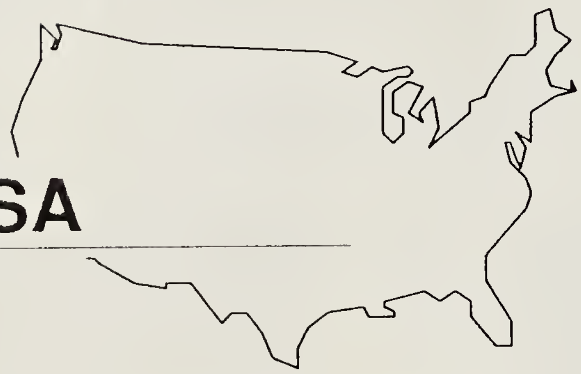
- **Data General** has announced that it will be offering the capability of serving Sun Microsystems equipment. It is reported that DG has entered into an agreement with Apex Computer Inc. in the U.S., who will provide training and inventory support.

- **Digital** has retained its largest third-party maintenance contract despite competition from IBM. The contract with Westland, the U.K. helicopter manufacturer, is worth roughly £2.5 million and covers all Westland computer equipment, with the exception of its IBM mainframes.

- **SD-Scicon**, the U.K. systems house, is reported as having reduced its PC maintenance support prices. The company offers a premium service providing on-site response within four hours and handles software support for some proprietary programs and a data recovery service within the overall maintenance contract.

- **LIFFE**, the London International Futures Exchange, has awarded its computer maintenance contract to Switch, a small London-based independent maintenance company with 15 employees and a turnover of approaching £1 million. A key factor influencing the awarding of the contract is the up-time guarantee offered by Switch. ■

News from the USA



Bell Atlantic Announces MAXwatch SM

On 5 December 1990, Bell Atlantic Business Systems Services announced MAXwatch SM, a systems integrity monitor for DEC VAX/VMS hardware.

MAXwatch monitors all network or clusterwide VAX systems and DEC or DEC-compatible peripherals. The system features call home capabilities, customer monitoring and notification thresholds, and can perform automated remedial actions in response to errors.

When certain critical errors occur, MAXcall SM automatically places a call to Business Systems Services' Technical Support Centre. The service call is immediately logged and processed for remote diagnosis and support. A field engineer can also be dispatched with the parts needed for repair.

MAXwatch software's reporting functions allow error history reports to be generated for any device over a specified period of time. Preventive maintenance can be scheduled as a result of hardware performance analysis.

MAXwatch is available at no charge as part of standard hardware service for VAX maintenance customers running version VMS 4.0 or later.

Novadyne Announces Remote Monitoring

Novadyne Computer Systems, Inc. recently announced Remote Monitoring, a proactive diagnostic system that regularly dials into a Tandem customer's computer system and identifies potential problems.

Key features include automatic dialing to the system, an analysis of error information, password protected/encrypted database security, and comparison of current data to history files to identify abnormalities.

Remote Monitoring improves systems productivity by identifying possible failures and scheduling repair at the client's convenience, before serious system failures occur.

Integrated Securities Program Announced by DEC

Digital Equipment announced an Integrated Security Program, formalizing Digital's commitment to information security and integrated security architecture for distributed, multivendor systems.

The Integrated Security Program is a series of security enhancements packaged for single systems, LANs, and management services to assist

organisations in implementing effective security controls.

The program addresses system and user identity verification, integrity of shared software and data, and confidentiality of sensitive information stored or transmitted across networks.

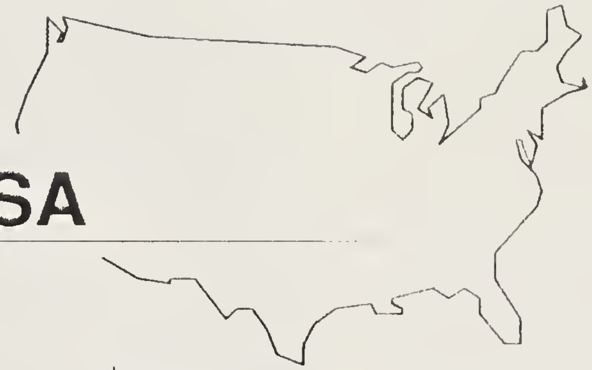
With these newly integrated security products, capabilities, and services, customers can choose the levels of security appropriate for their applications and organisations.

Help Desk System Software Available for BusinessWise

With the growth of internal help desks to field user problems, many companies are adding help desk software to their list of required software.

One of the offerings currently available to assist the internal help desk in the management of enquiries is SupportWise for BusinessWise. SupportWise offers telephone support system technology to quickly identify callers, capture call information, dispatch action requests and letters, maintain call history and client information, and allow access to prior calls, technical notes, and customer configuration information. SupportWise has been designed for the high-volume shop, supporting complex situations such as network installation and support. The Tech Notes search facility assists in the retrieval of technical bulletins and product notes. ■

Questions from the USA



Question:

What does Affiliated Computer Systems (ACS) offer for ATM maintenance service?

Answer:

ACS Field Electronics provides service on NCR, IBM, Diebold and Docutel ATMs. Customers can choose a combination of First Line, Second Line, and Cash Replenishment services to meet their requirements.

First Line maintenance includes repair of card or form jams, replacement of forms, maintenance of ATM appearance and surrounding area, unlimited number of calls, clearance of dispenser jams, customer selection of hours of service coverage, and no mileage surcharge for ATMs outside metropolitan areas.

Second Line maintenance includes four preventive maintenance inspections a year, customer selection of hours of service coverage, elimination of extra billings, rapid response to service calls resulting in improved ATM availability and increased transaction revenue, money-back guarantee in timely responses, network/communications support, monthly reporting on each ATM, unlimited number of service calls, no mileage surcharge for ATMs outside metropolitan areas, ATM camera maintenance, and two preventive maintenance camera inspection and test shots a year.

Cash Replenishment Services include ATM cash replenishment and balancing, return of captured cards, emergency cash replenishment, and deposit return where applicable. ■

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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Tel. (201) 801-0050
Fax (201) 801-0441

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International

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Paris
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- What are user objectives for data center management?
- How effective are the various kinds of networking technology?

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Managing Information Technology in the 1990s
Technology Issues
• Implementation Inhibitors • General Management vs. IS Management • Implementation Effectiveness
Image Processing, CASE, Applications Development, Data Center Management
• Status • Issues • Effectiveness
Recommendations

The report would be a bargain at full price. But INPUT wants to offer you an even better deal.

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INPUT's research team knows which questions to ask to uncover the truth about how these technologies are actually being used. And that kind of information can give your company a significant competitive advantage.

The Key Technologies

From a list of hundreds of technologies, INPUT chose the ones that offer the most potential to change the way IS departments operate:

- Artificial intelligence/expert systems
- CASE tools
- Cooperative processing
- Distributed data base management systems
- Imaging
- Networking (LANs, WANs, MANs)
- Object-oriented programming systems
- Relational data base management systems
- SAA
- UNIX and open systems
- Data center operations

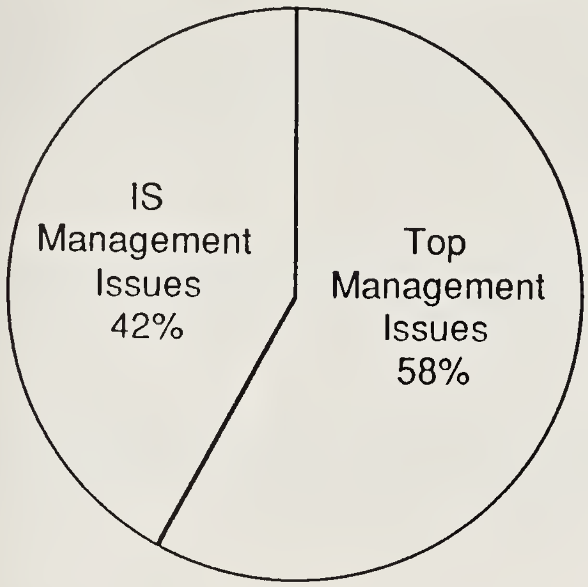
These are the developments we keep hearing about. But we rarely hear about how they work in the world *you* work in every day.

How Are They Really Used?

For each of these promising new technologies, INPUT's report determines to what degree their promise has been realized:

- Is interest in CASE really waning?

- How fast is distributed data base management technology being adopted?



- Who is driving the implementation of UNIX and open systems technology? How active is the typical IS organization in this effort? How do they rate its effectiveness, and why?
- What are the major trends in imaging? In what kinds of applications is it being used today? What are organizations' future plans for imaging technology?
- How are LAN, WAN, and MAN technologies being used today? What are organizations' plans for them in the future?
- How do IS managers rate the effectiveness of networking technology in their businesses?
- How are IS departments incorporating artificial intelligence and expert systems into their technology mix?
- What new ideas for meeting the maintenance challenge have been proposed? How has IS reacted?
- What are the ultimate objectives of the IS organization for data center management?

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This is the kind of in-depth, behind-the-scenes information that can make a tremendous difference to both user and vendor companies trying to evaluate how new technologies might actually fit into *their* world.

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Market Forecast
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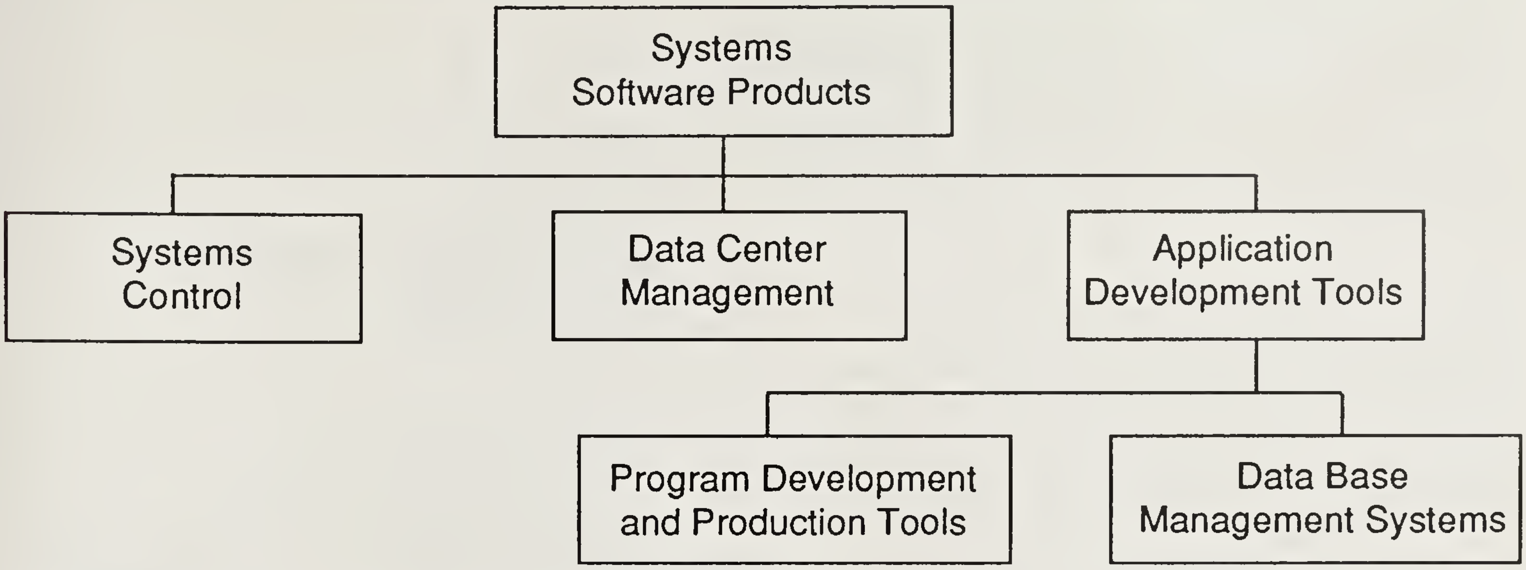
The report is therefore a powerful tool for strategic marketing, answering questions such as:

- Precisely where are the growth opportunities in nine market categories, and what forces are driving or hindering that growth?
- How will users' responses to the competing pressures of industry and proprietary standards affect *your* business?
- How successful will UNIX really be as a commercial operating system?
- How is the market for relational data base management systems changing, and how will those changes affect you?
- Where are the opportunities in cooperative processing?

And other large-scale questions that have a major impact on your strategic outlook.

Systems Software Products Market Structure



INPUT's analysis differentiates the forces impacting each of these segments.

Operational Intelligence

In addition, the report looks at tactical, competitive issues whose analysis can be useful in day-to-day operations:

- Are the open systems hardware vendors as deeply committed to UNIX as they say they are?
- Why are some companies concentrating so many resources on data center management software?
- Why is the use of CASE tools growing as slowly as it is?
- How are the minority investments of IBM, EDS, DEC, and others changing the systems software products markets?
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INPUT's systems software product analysts know the market from both sides. They have decades of experience as users and vendors, and have tracked the developments in this pivotal

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International

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Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

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- ▲ What are your competitors doing?
- ▲ How big is the market?

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INPUT has just released a report that offers vendors exactly that. Entitled *Systems Operations Management Issues and Practices*, the report is the result of an extensive research effort focused sharply on the systems operations market, including issues such as why companies contract or don't contract, what will motivate them to consider systems operations, and how successful contracts are managed.

To understand the needs and the market, researchers discussed issues and requirements with vendors and large and small users in numerous industries. They drew upon the resources and expertise of executives that have managed operations, and executives responsible for developing information systems.

Systems Operations Major Trends

- Growing Financial Constraints
- Growing Competition
- Growing Complexity of Technology
- Lack of Skilled Personnel

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- What impact will globalization have on systems operations decisions?
- How important will telecommunications and networking expertise be in the coming market for systems operations?
- How do equipment lease/purchase decisions affect the federal systems operations market?
- What is the next major area of systems operations growth?
- Who are the five leading systems operations vendors, and what are they doing right?
- How do most vendors structure their systems operations business?
- How important are alliances to systems operations contracts?

And a host of others that will define how you address the strategic facets of your systems operations decisions.

In addition, the report gives vendors invaluable insight into exactly how user companies are evaluating systems operations and making their

decisions to either enter the market or stay out of it for now. The report gets down to a level of tactical detail that you can't find anywhere else:

- What are the major reasons users decide to contract for systems operations services?
- In what order of importance do users rate security, cost, understanding of the user's business, and the overall importance of the IS function in making the contracting decision?
- What roles do expense control and capital conservation play in contracting decisions?
- What are the most common approaches to contract pricing?
- What are users' responses to common personnel issues, and how can you prepare for them?
- How have user IS organizations hampered users' attempts to get systems operations evaluated, and how can you fight back?
- What role does ensuring the availability of information play in this decision?
- What role do geographically dispersed operations play in the systems operations decision?
- What are the multiplatform/multistandard arguments against?

Plus questions about cost issues, capital conservation, multivendor networked environments, and more. The report closes with a comprehensive set of conclusions and recommendations that crystallize the relevant data and our consultants' thinking on this complex and tempting market opportunity.

The market opportunity is tempting. But you have to have exactly the right kind of competitive intelligence to exploit it.

INPUT gives it to you. Use the enclosed form to order your copy of *Systems Operations Management Issues and Practices* today!

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Systems Operations Management Issues and Practices
Market Overview
• Systems Operations Forecast • Systems Operations Options • Systems Operations Vendors • Market Forces and Issues
User Issues
• Buying Practices • Contract Types • Personnel Issues • Vendor Relations • Trends and Benefits
Vendor Practices
• Organization • Marketing and Sales • Contract Types • Personnel Issues • Customer Relations • Major Trends
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Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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New From INPUT:

The Federal Anti-Drug Program report

Information technology vendors use this report to

- Plan marketing strategies to compete for Drug War information technology contracts
- Understand the market potential for information technology to help fight the Drug War
- Learn ways to improve opportunities in this market
- Discover which Drug Control Program agencies are spending for information technology, and which technologies they are buying

Drug Control Program agencies involved in intelligence, interdiction, communications, and surveillance operations will spend approximately 12% of their drug control budgets on information technologies in FY 1991 and FY 1992.

Information technology is a significant weapon for fighting the drug war: It is used to track and identify drug-trafficking patterns, to accelerate the processing of information to enhance the effectiveness of interdiction efforts, and to facilitate the exchange of critical data.

Table of Contents

These are some of the key conclusions of a new report published by INPUT, *Federal Anti-Drug Program*. This comprehensive report

- Provides an overview of the Federal Anti-Drug Program
- Examines the issues and factors influencing the market potential for information technology in support of drug control program activities
- Discusses the role information technology will have in the drug war
- Provides critical information about market forces and agency expenditures to help vendors plan their marketing strategies to compete for drug war information technology contracts

Market Forces and Issues

The Administration considers the drug war a national priority and expects to increase political pressure aimed at achieving a drug-free America by 1995. Information technology will play a significant role in achieving this goal, but vendors will have to understand, and overcome, several market issues for this to happen. *Federal Anti-Drug Program* discusses these issues, clarifying

- Which forces are driving and inhibiting the use of information technology to fight the drug war—INPUT's report explains how Congressional inaction, presidential pressure, and agencies' need for system upgrades—among a variety of other forces—are impacting the market.
- What role alliances will play for vendors intent on entering this market—How can vendors form alliances with those already active in this market, and what are the benefits of such relationships?

- How security issues affect vendors' ability to enter this market—Intense security surrounds systems that contain sensitive data, making agencies reluctant to conduct open competition for bids. How can vendors overcome this barrier?
- What steps vendors can take to improve their opportunities in this market—INPUT's report suggests steps vendors can take to overcome a variety of roadblocks in this market, including the problem of interagency data sharing.

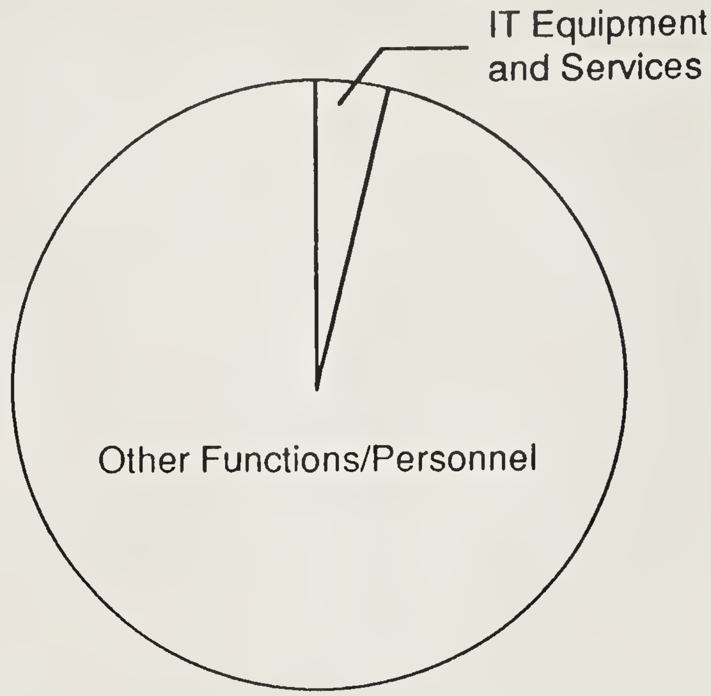
Information to Target Your Marketing

In addition to discussing general market issues, INPUT's report provides the specific information you need now to target your marketing activities effectively:

- Which Drug Control Program agencies are spending for information technology, and which information technologies are they buying?
- Which agencies are spending the most money for information technology?
- According to the National Drug Control Strategy, what are the top-priority information technology-related initiatives for federal agencies for the 1992-1994 period?
- What are the information technology budgets for FY 1991 and FY 1992 for the various Drug Control Program agencies?

Operating in any federal market or program can be difficult, and the Federal Anti-Drug Program is no different. But INPUT's research—which included a comprehensive review of governmental information technology budgets—suggests that the Anti-Drug Program offers healthy opportunity for information services vendors.

Agency Estimates for IT Expenditures FY 1991



INPUT's RESEARCH SHOWS that agency expenditures for IT equipment and services currently account for roughly 12% of the total Drug Control Program budget. However, IT initiatives will have to be given more congressional priority if the anti-drug strategy is to be effective by 1995, as planned.

Make the most of this opportunity. Order INPUT's *Federal Anti-Drug Program* report and learn how to focus your marketing strategies to compete successfully for information technology contracts.

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"Unlike most federal market segments that INPUT tracks, the federal market for IS education and training services will actually decline over the next five years."

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"In the coming years, federal government agencies will become increasingly dependent on their information systems, which will lead to enhanced sales opportunities..."

- Discover how to maximize your effectiveness in the federal information services market.
- Learn the views of senior federal officials on upcoming agency needs.
- Find out market size and growth expectations—and how the recession and the war are affecting federal spending.

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Oct. 6, 7, & 8 — **1991 U.S. Information Services Market Analysis Conference**
Fairmont, San Francisco

Let the experts tell you how to succeed

A Renewed Federal IRM Market

Don't miss this conference! If you're a vendor interested in assessing the overall sales prospects in various federal market categories, or if you're interested in improving your teaming prospects through networking, reserve time today to attend this important INPUT conference. This is your chance to learn from the experts!

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CIM Directions
Paul A. Strassman
Director of Defense Information
Department of Defense

Procurement Integrity for Contractors
Allan V. Burman, Administrator
Office of Federal Procurement Policy
Office of Management and Budget

Modernizing Treasury Information Systems
Stephen W. Broadbent, Deputy Assistant
Secretary, Treasury Department

Approaching the Federal Consulting Market
Dr. Paul Oliver, Vice President
Booz, Allen & Hamilton

Logistics Initiatives in the Air Force
Colonel Michael W. Hovastak, Chief
Logistics Information Systems
U.S. Air Force

Information Systems Modernization at the National Weather Service
Dr. Elbert W. Friday, Jr.
Director, National Weather Service

Federal Market Forecast, 1991-1996
John E. Frank, President
INPUT, INC.

JUNE 14 - FRIDAY

New Directions in VA Information Systems
Robert Woods, Principal Deputy Assistant
Secretary for IRM, Department of Veterans Affairs

Federal/State Information Systems Modernization
Joseph Leo, Deputy Administrator
(Management), Food and Nutrition Service
Department of Agriculture

Maximizing Federal IRM Effectiveness
Thomas J. Buckholtz, Commissioner
Information Resources Management Service
General Services Administration

Contractor Weaknesses in Federal Protest Actions
Stephen M. Daniels, Administrative Judge
GSA Board of Contract Appeals

Approaching the Federal Software Market
Dr. Philip Kiviat, Vice President
Chartway Technologies

FISSP Dialogue
James F. Kerrigan, Vice President
INPUT, INC.

Mail or fax your registration to INPUT, or call Barbara Fisher, Conference Coordinator, today!

Cancellations must be received in writing and are subject to a $50 cancellation fee. There are no refunds for cancellations received after June 5, 1991. INPUT considers purchase order numbers, company checks, or American Express as proper reservations. Payment must be received prior to conference. INPUT reserves the right to make changes to this conference without notice.

REGISTRATION FORM

YES! Sign Me Up! I need to learn the latest about what's happening—and how to succeed—in the federal information services market. I will attend INPUT's 1991 Federal Information Systems and Services Conference—*A Renewed Federal IRM Market*—June 13 & 14, 1991, Tyson's Corner Marriott, Vienna, Virginia.

☐ Yes, I am registering for this conference. There will be _____ attendee(s) from my company. I understand that I will be billed $750 for each of the first 2 attendees and $250 for any attendees thereafter.

☐ Yes, I am registering for this conference. There will be _____ attendee(s) from my company. I am an INPUT FISSP subscriber and can send 2 attendees at no charge.

☐ Please have an INPUT representative call me.

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INPUT Helps You Make the Right Connections in the Network Services Market

U SE OF NETWORK SERVICES IS expected to grow from 1990 to 1995. Despite the recession, the network services market will increase at a rate higher than that for the information services market as a whole.

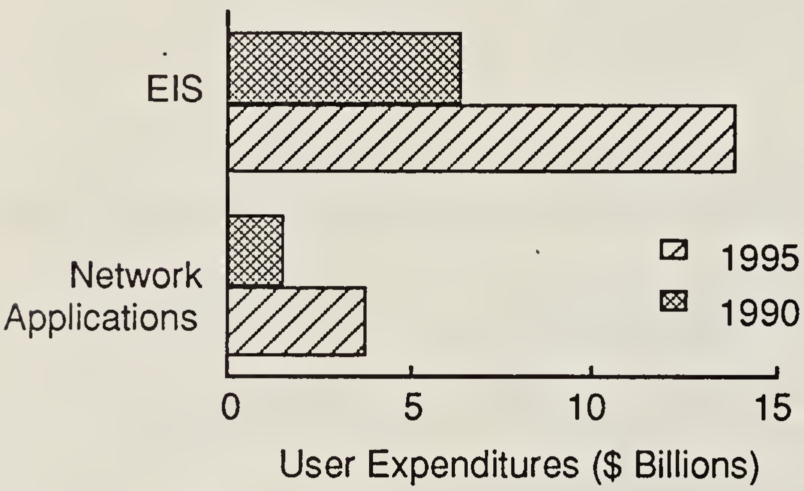
That means you have significant opportunities to develop your network services business, but you need market intelligence that will focus your product development and marketing efforts for success. INPUT gives it to you in a new report—*U.S. Network Services Market, 1990-1995.*

Network Services Market Quantified

INPUT segments the network services market into two submodes: network application services, which includes VANs, EDI, and electronic information interchange, and electronic information services, which includes on-line data bases and news services.

Within this context, the report presents a complete breakdown of network services revenues for the 1990-1995 period—for the market as a whole and for each of the two submodes. User expenditures for network services in each of 16 vertical industries are presented, giving you a general assessment of which industries present the greatest opportunities for network services vendors.

U.S. EIS and Network Applications Markets 1990-1995



Trends and Issues Reveal Opportunities

Then, so you can zero in on specific opportunities, the report discusses the issues and trends that are likely to have a significant impact on network services growth through 1995. It addresses questions whose answers will help you direct your energies to succeed:

- How is the economic downturn affecting network services expenditures?
- How is internationalization of the information services market affecting the network services market specifically?
- How will technologies such as CD ROM impact the implementation and adoption of new network technologies?
- What are the major concerns of information services buyers, and what capabilities are they seeking in the network services they purchase?
- How can vendors expand their existing products/ services, and what kinds of new products can they launch to stay ahead of the competition?

Competition Identified

INPUT's report also provides a complete overview of the top network services vendors, which includes their revenues, their products, and how alliances are helping them conquer new market opportunities.

If you're already on top, you don't need INPUT's help. But if you're like most network services vendors vying to make the right connections in this changing market, you can't pass up *U.S. Network Services, 1990-1995.* Order your copy today!

Yes! I want the latest information on the network services market. I need INPUT's report, *U.S. Network Services 1990-1995.* Please send me __________ copy (copies)

☐ at the fee of $2,695 each, a savings of ***10% off*** the regular price. I'm ordering *before* June 7, 1991.

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JW Marriott, Washington, D.C.

Oct. 6, 7, & 8 **1991 U.S. Information Services Market Analysis Conference**
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The Recession Is Changing Your Market ...

The 1990-1991 U.S. Economic Slowdown:
Impacts on Information Systems Budgets and Spending

General Recessionary Impacts

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- Information Systems Budget Trends
- Forecast of Impacts on 1991 Spending
- Internal Information Systems Spending
- External Information Systems Spending

Industry-Specific Recessionary Impacts

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Conclusions and Recommendations

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- Implications for Information Systems Vendors

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How To Keep Up With Changing Data Management Technology...

INPUT Can Tell You How, Right Now

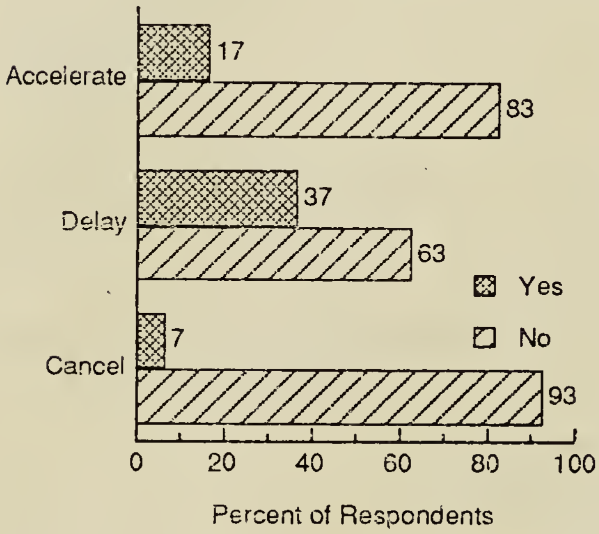
The recession is here. And it has never been so important to know how a changing economy is affecting your business. When the recession is over, you don't need to *recover*, you need to hit the ground running.

INPUT has just published a special report, *The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending*, that gives you the information you need to make solid business decisions in a troubling economic environment—decisions that will affect your business long after the recession is over.

Targeted Questions You Need to Ask

This report covers in detail the recessionary effects on systems and application software; systems integration and operation; turnkey systems; and network, professional, and processing services, and asks the questions you would ask given INPUT's resources. It also presents INPUT's invaluable assessment of how the recession will affect IS vendors and users. What's more, it gives the insights of industry experts who have analyzed many downturns in all relevant sectors of the economy.

Recession Impact on Applications Development Plans



INPUT surveyed 100 organizations in many industry sectors to find out how they are planning to buy information services to meet the challenges of the recession. The report asks questions about the market as a whole, and then specifically about each of 16 major vertical industries.

Questions include:

- What are the specific impacts of the recession on use of external information services?
- What are the leading organizational spending restrictions in place now? What will they be in 1991?
- Are information budgets up or down, and what forces are driving these budgetary trends?
- What will the budget changes be from 1990 to 1991 in staffing, hardware, software, outside services, and telecommunications?

Exceptional Research Hot off the Presses

The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending gives the most accurate portrayal of how the market in general and various specific industries are changing their information services purchase plans. It contains the hottest information on the most urgent business topic around—don't miss out.

A recession is no time to roll the dice. You need information that will take the gamble out of your business decisions, and INPUT can give it to you. Use the form below to order your copy today.

Yes! I need to know how the downturn might affect my business. I need the research and analysis in INPUT's report, *The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending*. Please send me __________ copy (copies)

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"Undoubtedly operational software support is the largest untapped sector of the software and services market in Europe"

Use this report to find out:

- ✓ the structure of the software support and maintenance market
- ✓ the areas of opportunity available
- ✓ the factors shaping the market
- ✓ implications for vendors
- ✓ market size and forecasts by major European country market

Operational Software Support and Maintenance Opportunities in Western Europe

Large Untapped Market

INPUT's research into the market for maintaining user-written applications software shows that this is the largest untapped sector of the European software and services market.

Report Contents

Understanding this sector of the market could provide your company with a lucrative business opportunity for the immediate future.

INPUT's new report, *Operational Software Support and Maintenance Opportunities in Western Europe*, defines and quantifies this market to show the size of the opportunity available. The report also discusses the issues and trends in the marketplace to help you understand how the market is developing and the implications for vendors hoping to enter the market.

The Size of the Opportunity

INPUT's study reveals that on average around 65% of all IS staff activity is devoted to operational software and maintenance, and very little of this is currently outsourced. INPUT's report provides a market forecast for the following countries:

- France
- Germany
- U.K.
- Italy
- Scandinavia

The forecast identifies the size of the existing market for the provision and support of both product and custom software.

The market forecast is split into:

- Systems software products
- Applications software products
- External contractor software
- Operational (in-house) software

The forecasts can help you to define the market and find out the proportion of spend users divert into software maintenance, and how this is split between internal and external sources.

User Attitudes

The results of 200 European user interviews has enabled INPUT to find out which industry sector markets offer the best opportunities for winning software support and maintenance contracts and which country markets are most concerned about software maintenance and support.

INPUT's user research has identified the primary factors that lead companies to use third-party professional services, and the factors that limit the use of such services. This data provides you with valuable insights into why users choose to outsource to third parties and what prevents them from doing so.

Order Form

INPUT's Research Studies

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Please enter my order as described:

Operational Software Support and Maintenance Opportunities in Western Europe at the fee of $2,850.

Standard delivery includes one copy of all reports issued. Clients may purchase additional copies at $665 per copy.

- ❑ Please send ________ extra reports.
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The client agrees to control access to the information provided to prevent unauthorized disclosure in violation of this agreement.

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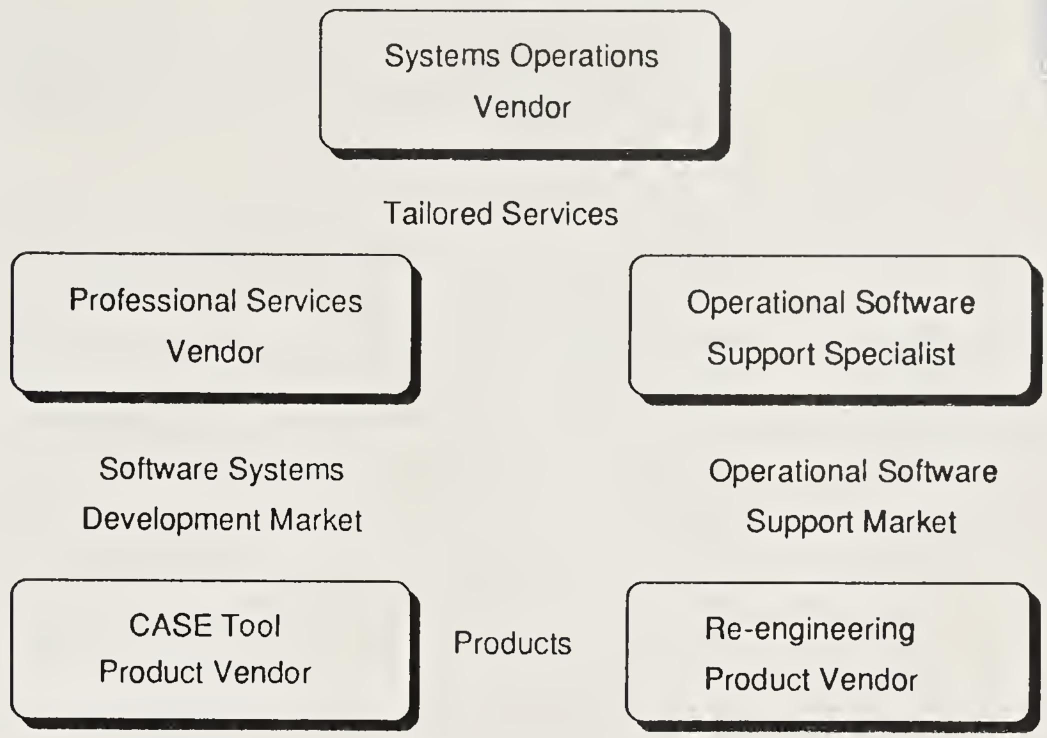
You will be able to better target your sales and marketing activity by highlighting the benefits of outsourcing and responding to the factors that users perceive as negative.

INPUT's report also presents the results of two user case studies, where the operational support is defined and the vendor-proposed solution described, with the resulting benefits to the user. The first case study examines the experience of a government department in contracting out the maintenance and support of an old database application. The second study examines the experience of a large IS group within a telecommunications PTT that needed to free IS staff with specific business knowledge.

By relating these situations to your own client base, you can use the information to help develop strategies for offering solutions to your clients.

INPUT's report reveals users' perception of software support and maintenance and discusses the issues that concern them. You can use this information to be more responsive to your clients.

Operational Software Support Vendor Strategies



Vendor Success

The number of vendors active in this market remains small, but their success is noteworthy. You can use this report to find out how vendors address this market sector:

- The factors which lead to success in this market
- The five types of service that could make up a portfolio
- Views on profitability

The report discusses how vendors are packaging their service offerings, and how they are adapting their organisational structures to sell these services, for example, by industry sector, or by setting up dedicated teams.

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Atrium at Glenpointe
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050   Fax (201) 801-0441

Washington, D.C.—INPUT, INC.
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Vienna, VA 22182
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International

London—INPUT LTD.
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
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Paris—INPUT SARL
24, avenue du Recteur Poincaré
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Tel. (33-1) 46 47 65 65 Fax (33-1) 46 47 69 50

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Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
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  - Federal Government
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  - Cross-Industry Specific
- Systems Software Products
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools (CASE)
- Processing Services
  - Transaction Services
  - Utility Services
  - Systems Operations (FM)
  - Other Processing Services
- Network Services
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  - Electronic Mail
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- **Research Bulletins**

Published periodically, these research bulletins outline INPUT's analysis of current market issues and trends.

- **Access to INPUT Consultants**

Clients receive continual support from INPUT's executives in Silicon Valley; New York; Washington, D.C.; London; Paris; Frankfurt; and Tokyo. They may be called upon for market information as well as opinions about industry issues and trends.

- **"Hotline" Inquiry Service**

This invaluable research service provides clients with ready access to INPUT's files and databank on more than 1,000 companies in the information services industry.

- **INPUT Conference**

This conference updates INPUT's clients on key developments and trends in the computer software and services industry. It provides a forum for discussions with senior INPUT staff members and top executives of client firms.

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About INPUT

Formed as a privately held corporation in 1974, INPUT is an independent, international market research and consulting firm focusing on the information systems and services industries.

INPUT provides planning information, analysis, and recommendations to managers and executives in user and vendor organizations. Clients receive services through:

- Continuous Subscription Program
- Custom Research and Consulting Projects
- Acquisition Services and Support
- Multiclient Studies
- Conferences and Seminars
- Executive Presentations
- Research-Based Reports and Newsletters

INPUT's most valuable asset is its staff of experienced professionals, many of whom have more than 20 years' experience in their areas of specialization, which include telecommunications, software products, information systems, customer service, processing services, marketing, and planning. This diverse experience enables INPUT to supply timely, practical solutions for complex business problems.

INPUT's offices are located close to major client centers in three U.S. cities as well as London, Paris, Frankfurt, and Tokyo. At a time when U.S. industry faces intensified foreign competition, this global focus enables INPUT to supply invaluable information on the opportunities available in industries overseas.

INPUT has become a key source of information and support for more than 200 of the world's most advanced systems and services companies.

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Chances Are, CASE Will Have a Big Impact on Your Future . . .

Let INPUT Prepare You for It.

The Future of CASE, 1991-1996

Report Highlights

- CASE in the IS context
- Stages of CASE integration
- CASE market forecast
- The competitive environment and AD/Cycle
- Leading vendor strategies

Read INPUT's New Report Today, and See How CASE Will Affect Your Business Tomorrow

INPUT's new report, *The Future of CASE, 1991-1996*, gives you the information you need to make the right decisions about CASE.

A Slow Beginning. A Promising Future?

Since the mid-1980s, CASE has held out the promise of making significant impact on the applications development process, and has the potential to make a far-reaching impact on the information services industry as a whole.

Even now, it's no secret that the promise for CASE is still largely in the future, but that future may be closer than you think. CASE is going through big changes, and over the next five years, it has the potential to change your business significantly—whether you're a user, a software vendor, or a professional services or systems integration firm.

INPUT's comprehensive report, *The Future of CASE, 1991-1996* gives you a complete explanation of the issues that currently affect the CASE market and your place in it. Don't miss out on this glimpse of your future.

IS Departments' Requirements and Plans—Making the Case for CASE

INPUT's comprehensive research—which included written questionnaires from 92 CIOs, telephone interviews with 34 senior IS executives and CASE planners, and in-depth meetings with senior staff of over 20 CASE vendors—revealed important insights on CASE implementation issues that can help you focus your CASE efforts. The report answers questions such as:

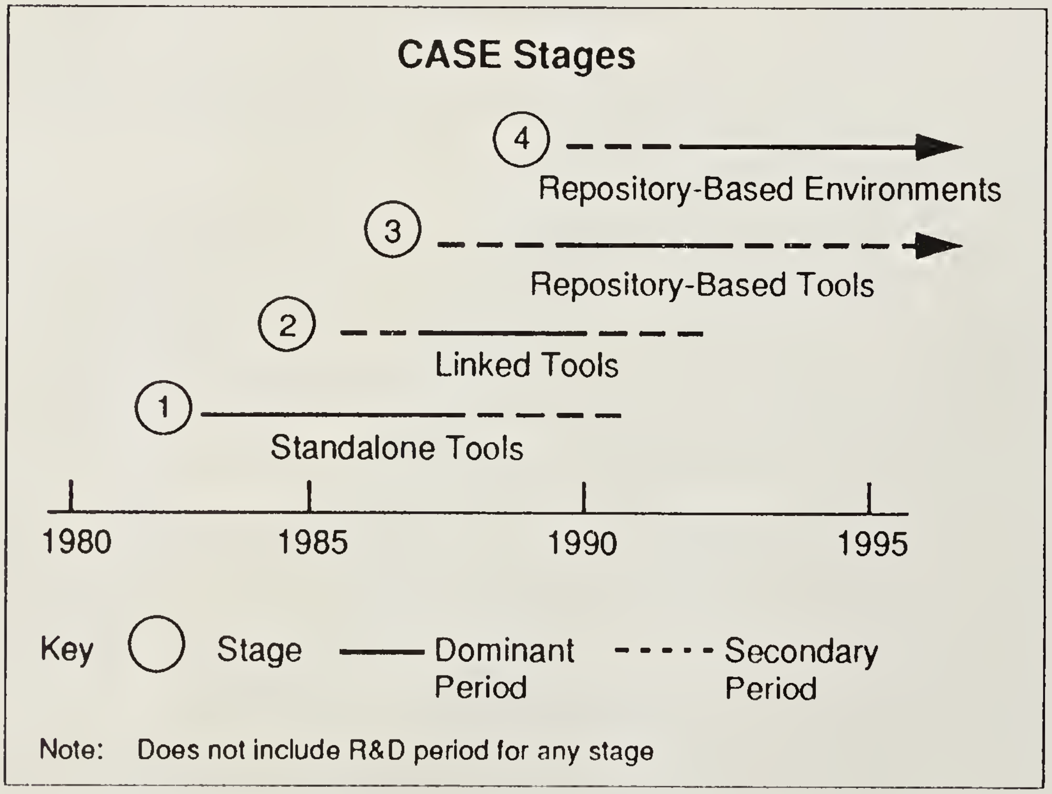
- How effective has CASE been in corporations?
- What is the current and planned use for CASE?
- What CASE products will be most favored in the future?
- More broadly, what changes are occurring in the nature of applications development?

One of the most interesting—and useful—results of the research is a series of "snapshots" contrasting the importance CASE users and vendors place on particular issues and how much knowledge or understanding of these issues each side now has. Such issues include:

- Reasons for CASE success and failure
- The impact of CASE on end users
- Re-engineering
- The impact of CASE on professional services and systems integration vendors

Three-quarters of the companies interviewed reported some CASE use. But CASE still has not shown significant results. INPUT's report analyzes the reasons for this in depth:

- What are the most serious barriers to wider CASE use?
- How important are the "soft" (e.g., cultural, organizational, and planning) issues?
- How has the lack of CASE tool integration affected wider CASE use?



INPUT has divided CASE development into four stages. A complete explanation of these stages provides an in-depth history of CASE and a full assessment of where CASE is going—so you can plan your CASE strategy with confidence.

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Dear Colleague:

CASE technology is changing rapidly, and INPUT can give you the information necessary to adapt to these changes successfully.

The Future of CASE, 1991-1996 is INPUT's newest report on the CASE market. Through extensive user and vendor interviews, INPUT has compiled an invaluable resource that discusses in depth the most important issues driving CASE growth today—issues that will have a profound effect on your business.

The report includes complete assessments of users' readiness to implement CASE, technical barriers to wider CASE use, reasons for CASE success and failure, AD/Cycle and its effect on the CASE market, re-engineering, the next generation of CASE, and more. INPUT's experienced researchers have written the most comprehensive study of CASE available.

The report also gives a series of growth forecasts for the CASE products market. Since CASE is relatively immature, it is subject to several market variables. INPUT takes these into consideration and presents three possible growth scenarios that analyze fully individual components of CASE growth.

At a time when CASE developments are forcing you to reassess CASE in your business, isn't it wise to be as informed as possible? *The Future of CASE, 1991-1996* will give you the background necessary to ask yourself the right questions about CASE. You'll find out where you stand so you can take full advantage of the potential CASE offers. Please order *The Future of CASE, 1991-1996* today.

Sincerely yours,

Doug Tayler
Vice President

ORDER FORM

YES! I want INPUT's report, *The Future of CASE, 1991-1996.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me _______ copy (copies) of INPUT's report, *The Future of CASE, 1991-1996* at the fee of $2,495 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

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CASE Forecast—Scenarios for Future Growth

Because CASE is relatively immature, it is subject to many variables. As a result, INPUT has prepared a market forecast to reflect alternate scenarios, providing a series of analyses on individual components of CASE growth. These serve as checkpoints against which you can measure your own development. INPUT's report answers questions such as:

- What market and technical factors affect CASE in both the near term and medium term?
- How will organizational readiness issues affect CASE implementations?
- By 1996, where will the greatest need and opportunity be in the CASE products market?
- How will developments in re-engineering techniques affect growth?

The report addresses several additional issues that will help you fine-tune your CASE strategy for success.

Are You Prepared for the Next Generation of CASE?

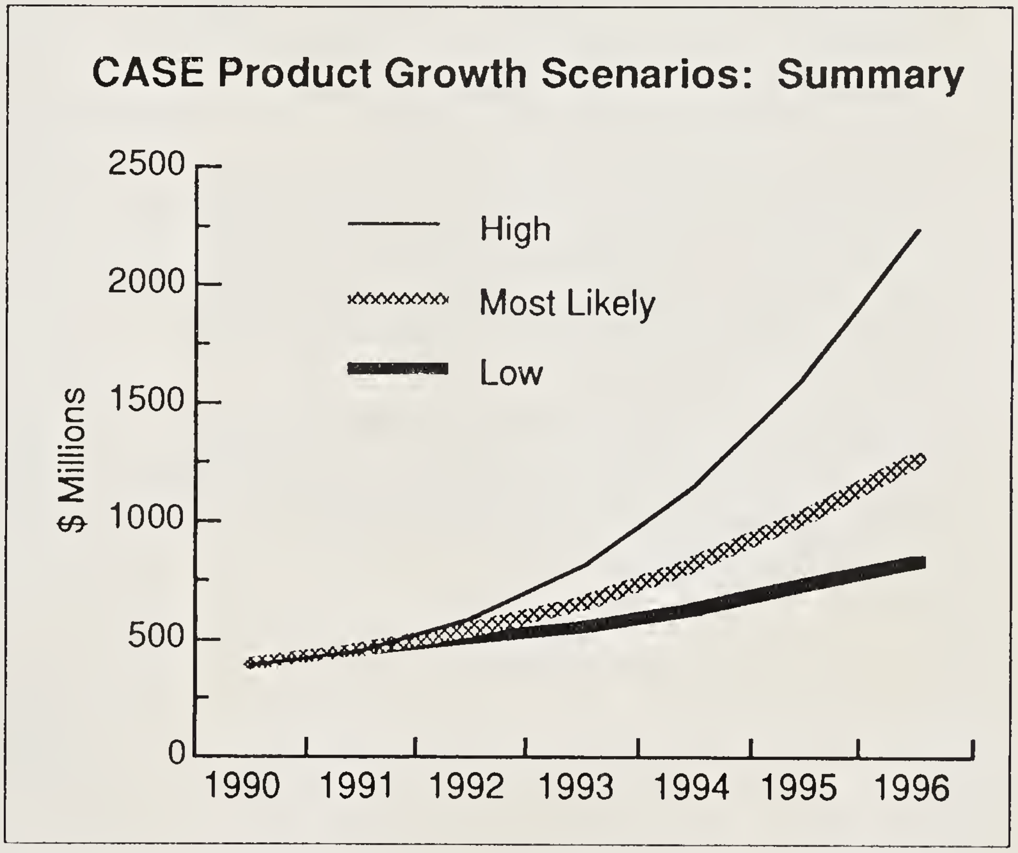
INPUT's analysis has identified four stages in CASE development, which started in the mid-1980s with standalone tools. Currently, CASE is in Stage 3, repository-based tools. Within this four-stage context, all CASE participants will have to deal with such issues as:

- What effect will AD/Cycle have on vendors other than IBM, and how can they compete with AD/Cycle? What role will partnerships play in this competition?
- What should be done now to prepare for a re-engineering environment?
- How is the focus of computing and application development likely to change in the next five years? How does your firm compare?
- What options do professional services and systems integration firms have in responding to CASE developments?

The Future of CASE, 1991-1996, provides the most detailed, comprehensive assessment available of business-related CASE and its implications for your enterprise—whether you're an information services vendor or are responsible for making CASE effective within an enterprise.

This report not only gives you analysis of some of the most pressing issues affecting the CASE market today, but also gives you the background necessary to ask yourself the right questions regarding CASE in your business. You'll find out where you stand today, and where you need to be tomorrow to take full advantage of the tremendous potential CASE offers.

Don't get left behind. CASE is changing, and chances are you'll need to change with it. Order INPUT's new report and discover how.



CASE product growth for the first half of the 1990s is promising, but will depend on several variables. INPUT's report outlines these, presenting the most likely growth scenarios.

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London SW1Y 4NF, England
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When You Need the Best Available Intelligence on Systems Operations Opportunities . . .

- ➪ How big is the market?
- ➪ Which vertical industry market is growing fastest?
- ➪ What are the major decisions for buyers?
- ➪ Who are the leading vendors?
- ➪ What forces are driving market growth?

. . . You Need INPUT's New Systems Operations Market Report!

The systems operations market is hot right now, with great potential for long-term growth. But how big is it? Where and when is that growth going to occur? And how can you take advantage of the best opportunities?

INPUT has just released a new research report that was written to give you exactly this kind of focused market intelligence. Entitled *U.S. Systems Operations Market, 1990-1995*, the report is a distillation of the primary research and informed analysis that only INPUT can bring to bear on this subject.

Report Contents

Market Analysis and Forecast

- **A.** Market Structure
- **B.** Market Forecasts, 1990-1995
- **C.** Key Marketplace Factors
- **D.** Competitive Environment

Vertical Markets for Systems Operations

- **A.** Banking and Finance
- **B.** Discrete Manufacturing
- **C.** Education
- **D.** Insurance
- **E.** Health
- **F.** Process Manufacturing
- **G.** Retail Distribution
- **H.** State and Local Government
- **I.** Transportation
- **J.** Telecommunications
- **K.** Wholesale Distribution
- **L.** Utilities
- **M.** Business/Technical Services
- **N.** Personal/Consumer Services
- **O.** Miscellaneous Industries

Market Strategies and Recommendations

- **A.** Market and Opportunity Identification
- **B.** Marketing and Sales
- **C.** Partnership Management
- **D.** Recommendations

Research like this can take a lot of the guesswork out of your product development, marketing, and sales decisions.

And if you act before May 17, 1991, you'll pay $300 less than the regular list price for the report—a savings of 10 percent!

This is the only single-volume systems operations market report available today that gives you precisely the information you need to make good decisions, and in a concentrated format that you can put to use immediately.

Broad-Market Questions

U.S. Systems Operations Market, 1990-1995, addresses the important questions that you have to answer to shape your company's future market presence:

- What is the total market size? What is its projected annual growth rate over the next five years? What will the total market size be in 1995?
- What are the differences in the sizes and growth rates of the systems operations market by delivery mode (professional services and processing services) and by type (platform and applications)?
- Which forces are driving users to consider and contract for SO?
- Which forces are inhibiting market growth, and how do you deal with them?
- Who are the major competitors in this market?
- Why is the federal government a growth market even in these days of tight budgets?
- What can you do to position yourself to fully exploit this opportunity?

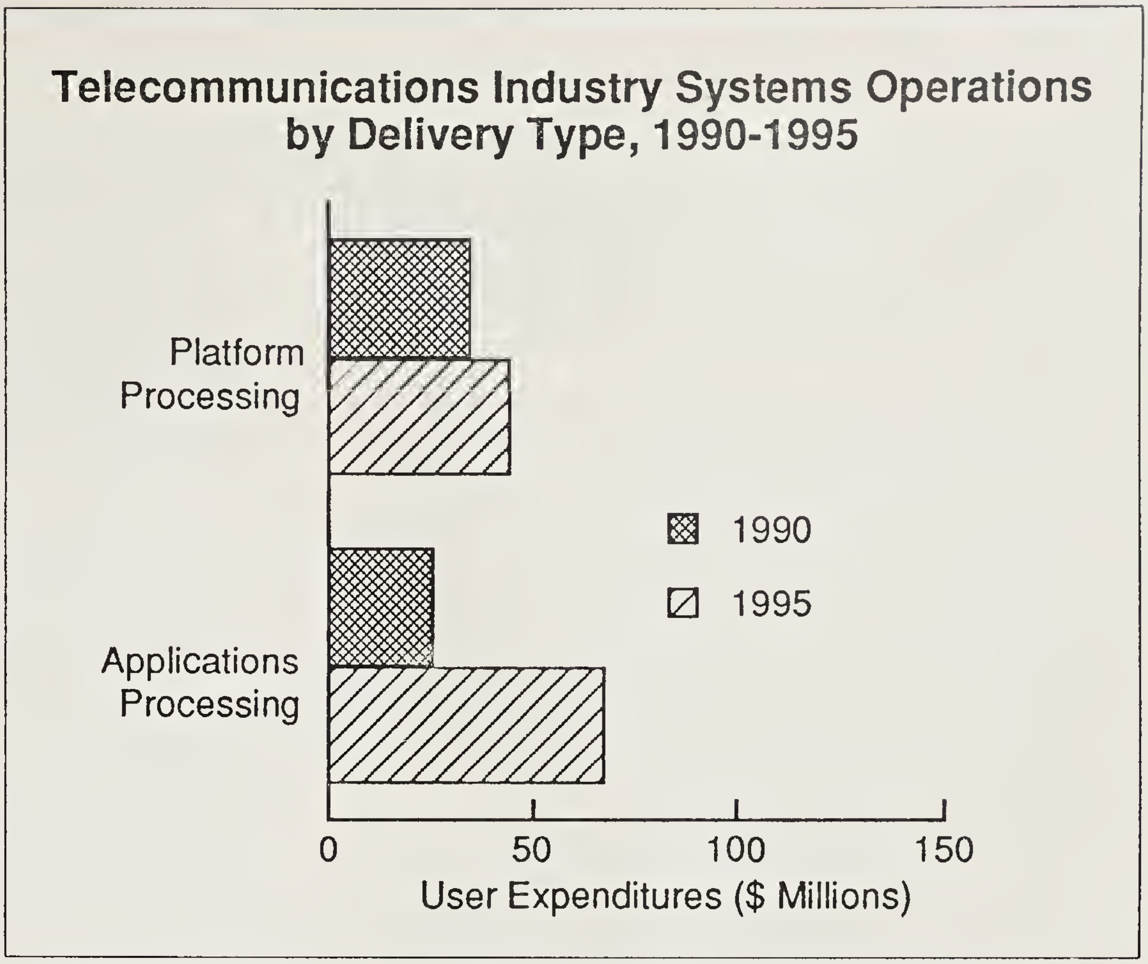
And many others concerning every aspect of the systems operations markets now and through 1995.

Get the Specifics

The report also gives you more specific intelligence on how to best segment this market, what users really want, and how different industries evaluate the costs and benefits of systems operations:

- What are the nine primary motivations buyers have to contract for systems operations services in general?
- How do buyers rank these motivations in order of importance?
- For each of 16 vertical markets, what forces are shaping systems operations. How are these forces affecting the market for SO, what is the IS environment like, and what is the SO potential?
- What are the sizes and compound annual growth rates of these 16 market segments?
- What are the impacts of deregulation, the thrift crisis, and the commercial real estate slump on SO in banking and finance?
- What has the decade-long push to automate the factory floor done for the IS environment in discrete manufacturing, and where are the SO opportunities?
- What is the SO potential in the insurance industry, where the potential entry of such new competitors as banks, hospitals, and foreign insurers has some domestic insurers worried about market share?

This report addresses all of these questions, giving you invaluable in-depth research and analysis put together by one of the most respected research and consulting organizations in the information services industry.



THE LEVEL OF DETAIL provided by the report is evident in this exhibit, which gives the size and growth rates of the two main delivery types for systems operations in a specific industry.

This report is more than just numbers—it offers you incisive analysis of these market data, an analysis that puts at your disposal the accumulated expertise of some of the finest minds in the business.

The opportunities in systems operations are there. But to exploit them fully, you need more than just a back-of-the-envelope plan. You need INPUT's report *U.S. Systems Operations Market, 1990-1995*. Use the enclosed form to get your copy today!

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> *"Bank providers should view corporate electronic trade payments (CETP) as a market offering that helps retain or bring in new corporate customers—not as a revenue generator in and of itself."*

To Make the Most of Your Future, INPUT Gives You a Crystal Ball . . . .

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Look into the Future of CETP

While use of corporate electronic trade payments (CETP) is expected to increase dramatically over the four years, still only 25 of the 14,000 banks in the U.S. offer full CETP services. That means there's a huge market for CETP that has yet to be tapped. But entering this market is not straight forward—it requires the service provider to *create* it. And that requires the right information.

INPUT's new report, *Developments in Corporate Electronic Trade Payments*, gives you this information, providing the most comprehensive assessment of CETP available.

Trends and Issues Clarified

Through structured interviews with key EDI/EFT personnel at banks, software vendors, and user organizations, INPUT has developed a solid picture of what's going on in the CETP market and how it's likely to progress through 1995. Along with five-year CETP market revenue forecasts, it discusses:

User Practices

- How will CETP affect the number and size of payment transactions?
- Why do CETP users reduce the number of banks they use to disburse funds?
- How will the CETP user choose the banks to handle its electronic payments?

Market Drivers

- How are government programs driving the CETP market?
- How will the growth of EDI in general affect CETP specifically?
- How will restructuring and consolidation in the banking industry affect the market for CETP through 1995?
- Who will emerge as the key players in the CETP market—banks, service providers, telephone companies, corporate users?

Emerging Payment Practices

- What are the pros and cons of adopting a debit vs. a credit payment mechanism?
- How is "electronic barter" putting banks at risk of losing the payment franchise?
- How are non-banks getting into the business of electronic payments? How will this affect banks?

Increased Competition on the Horizon

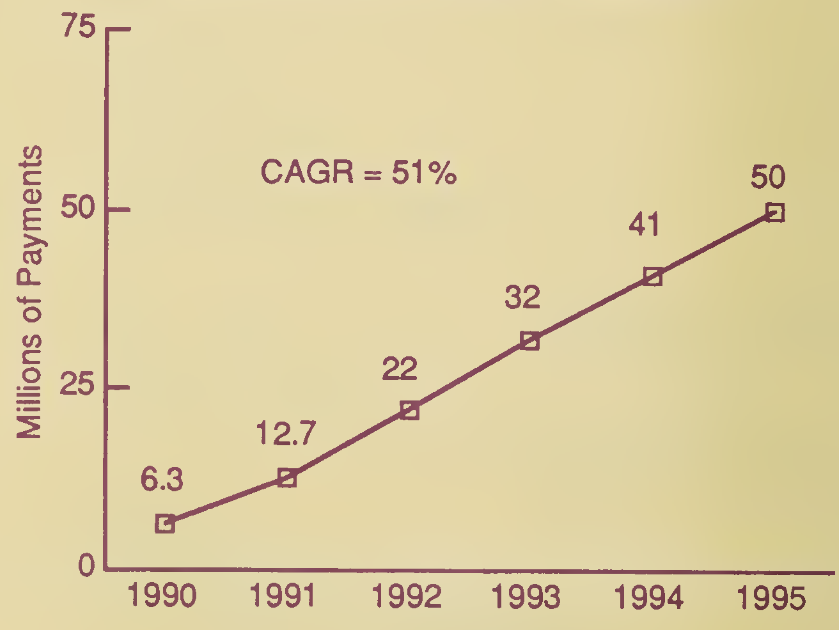
The competitive environment for CETP is heating up, with not only banks but large corporate users, network service providers and software vendors vying for a piece of the action. INPUT's report profiles bank providers of CETP services, leading CETP service providers, software vendors, and eight user organizations. This kind of news about your competitors is exactly what you need to develop and market your services as effectively as possible.

- What kind of CETP software products are available?
- What services are banks offering to their corporate customers to enhance the value of their CETP programs?

CETP will continue to change the way banks do business with their corporate customers. Understanding these changes, whether or not you currently offer CETP, is key to staying competitive in an industry that is facing consolidations, restructuring, and growing competition.

Let INPUT's report help you make the most of the CETP market. Don't miss out! Order your copy of *Developments in Corporate Electronic Trade Payments* today.

Corporate Electronic Trade Payments Volume Estimate and Forecast



Based on NACHA data

Yes! I need a comprehensive assessment of CETP. I need INPUT's report, *Developments in Corporate Electronic Trade Payments.* Please send me __________ copy (copies)

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What's Going On in the Processing Services Market?

Modest Growth.

Intense Competition.

- ▲ How big is it, and how will it grow over five years?
- ▲ How are new architectures and cheap MIPS affecting it?
- ▲ How are the big players diversifying?
- ▲ How interested should I be in disaster recovery services?
- ▲ Where will the new growth opportunities be?

How Do You Succeed? Read INPUT's New Report

When a market shows only modest growth, like the processing services market, the companies that succeed usually have something their competitors don't.

They have specific intelligence on what trends are shaping the market, where the market is going, and where the best opportunities are for companies that are alert and agile enough to exploit them.

INPUT has just released a new report to give you this intelligence *now*, when changes in the market could very well dictate substantial changes in your product, marketing, and sales strategies.

Entitled *U.S. Processing Services Market, 1990-1995*, the report offers detailed five-year market projections by delivery mode and by vertical industry. It is a comprehensive analysis of a market offering considerable revenue and profit opportunities.

And if you act before May 7, 1991, you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

What's happening in processing services? Why has it offered several large companies dependable margins over the long haul? INPUT's report answers these questions and more.

Report Contents
General Business Climate
• General Economic Climate • Information Services Industry Issues and Climate • Processing Services Business Issues and Trends
Market Forecast
• Processing Services Overview • Driving Forces • Submode Market Forecasts
Issues and Trends
• Transaction Processing Services • Utility Processing Services • Other Processing Services
Competition
• Market Leaders • Competitive Issues • Segment Leaders • Vendor Profiles
Conclusions and Recommendations
• Processing Services Overview • Transaction Processing Services • Utility Processing Services • Other Processing Services

Sweeping Trends

The processing services market is in the grip of significant forces that are changing how the game is played. INPUT examines these forces, answering questions like:

- How big is the market today, and how fast will it grow for the next five years?
- How will outsourcing affect market growth and your business in the future?
- What impacts will the recession have on the overall market for processing services?
- How can you best prepare for the downturn?
- What large-scale impacts will improvements in client/server architectures and dollars/MIPS ratios have on processing services?
- Which submarkets have the best promise for short-term growth? For sustained long-term growth?

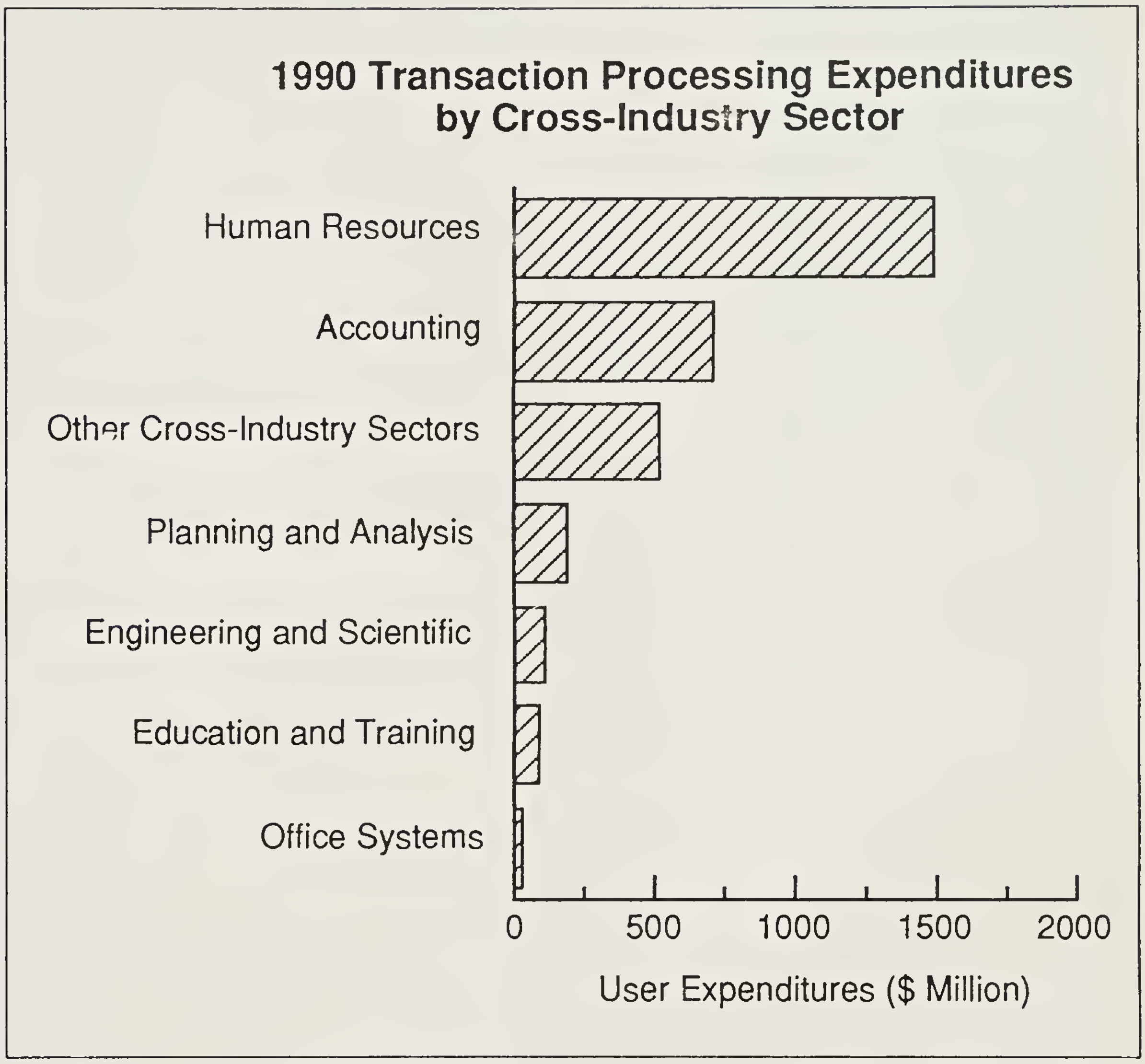
INPUT's experts have watched the processing services market grow for decades. This report puts their combined expertise to work for you in analyzing these sweeping trends.

INPUT®

Ramifications

But that's not all. In addition, INPUT's report, *U.S. Processing Services Market, 1990-1995* delves into the specific dynamics of much smaller changes whose ramifications could still have a tremendous impact on your business:

- Who are the leading processing services vendors, and what are they doing right?
- How important is systems operations to these vendors, measured in dollars?
- Who are the leading vendors in utility processing services? In specialized niche markets?
- How are large vendors offering their clients an expanding mix of service offerings?
- Who are the dominant competitors in disaster recovery services?
- What is the opportunity in this area?
- What are the long-term prospects for computer-output microfilm (COM) services?



WHERE DOES THE MONEY GO? The report tracks expenditures in several different ways, including yearly outlays by cross-industry sector.

And more on the specific questions you must answer to stay ahead of the curve in a market whose growth might be modest, but whose changes are likely to be significant in the short term.

The money is there to be made, but it takes excellent market intelligence to figure out how to invest your resources to get the highest possible return.

INPUT's *U.S. Processing Services Market, 1990-1995* gives you that market intelligence now, ahead of the curve, when it will have the greatest impact on your business.

Use the enclosed form to order your copy today!

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Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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Dear Colleague:

As a client of INPUT's Systems Integration Program, two representatives of your company are entitled to attend the program's annual Systems Integration Conference.

This year the conference will be held at the JW Marriott in Washington, D.C. on Wednesday and Thursday, July 24th and 25th.

The conference will include a review of this year's research and will also include several user speakers. Copies of the conference brochure, agenda, and registration form are enclosed. Please return the registration form as soon as possible.

We look forward to seeing you in Washington.

Sincerely,

Doug Wilder

Douglas R. Wilder
Manager, Systems Integration Program

INPUT

Network Management as a Systems Operations Outsourcing Opportunity—Western Europe 1991-1996

This report is essential reading if you want to win outsourcing contracts for managing networks. INPUT's report:

- ✦ defines this misunderstood area
- ✦ sizes the market
- ✦ identifies a three-stage outsourcing cycle
- ✦ discusses user and vendor perceptions of networks
- ✦ provides concrete recommendations to vendors hoping to win outsourcing contracts for managing networks

Network Management— A Major Outsourcing Opportunity

The outsourcing of information systems management is greater as user organisations come under increasing cost and resourcing pressures. INPUT has just completed research into a specialised area of outsourcing, network management, to help vendors plan their strategies in this market.

Report Contents
Market Definition
• Systems Operations Market Sector • Outsourcing • The World Market • The European Market • Positioning Parameters • Market Positioning—User Viewpoint • User Perspectives on Systems Operations • System Aspects • Market Positioning—Outsourcing • Vendor Activity • Outsourcing Market Analysis • European Analysis and Forecast • Market Evolution
Market Analysis and Forecast
• Outsourcing • Market Size
Vendor and User Considerations
• Importance of Network Management • Contract Revenues • Trends • Vendors Perceive Strategic Benefits • Reasons for Contracting • Market Leadership Opportunity
Managing User Networks
• Network Management Described • Network Management Functions • Organisation of Network Management • Network Management Issues
Conclusions and Recommendations

INPUT's new report, *Network Management as a Systems Operations Outsourcing Opportunity—Western Europe, 1991-1996* provides vendors planning to offer a network management service with important information on how best to approach this market. INPUT's research has found that this market is largely misunderstood and hence suffers somewhat from loss of visibility. INPUT's report clarifies the current market position and discusses the opportunities available for vendors, providing important planning information.

INPUT believes that this sector offers major opportunities for outsourcing contracts; the market is expected to increase at a compound annual growth rate of over 25% per annum. However, in order to take advantage of the opportunities, vendors need to understand the scope and definition of network management. INPUT's report clarifies where the opportunities lie and defines the scope of the network management market so that vendors can make the most of it.

Networks are becoming increasingly important components of user's information systems, which are key to the user's business. As users are becoming more open to the concept of outsourcing the operation of their information systems, factors such as lack of in-house resources and increasing network complexity are influencing the decision to outsource the management of the network. INPUT's report discusses this and other trends affecting the network management market.

Network management contracts can cover the management of the user's network only, or they can be part of a contract covering the rest of the user's information systems centre, which includes the network. INPUT's report sizes the market for both of these opportunities.

Users and Vendors Differ in Defining Networks

INPUT's research has shown that users tend to view a network as including any component of the network. Vendors, however, take a narrower, product-based view, which could become an inhibiting factor in deciding the scope of network management contract Being aware of potential problems such as this can help you avoid some of the pitfalls.

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Network Management as a Systems Operations Outsourcing Opportunity—Western Europe, 1991-1996 report at the fee of $2,550 each.

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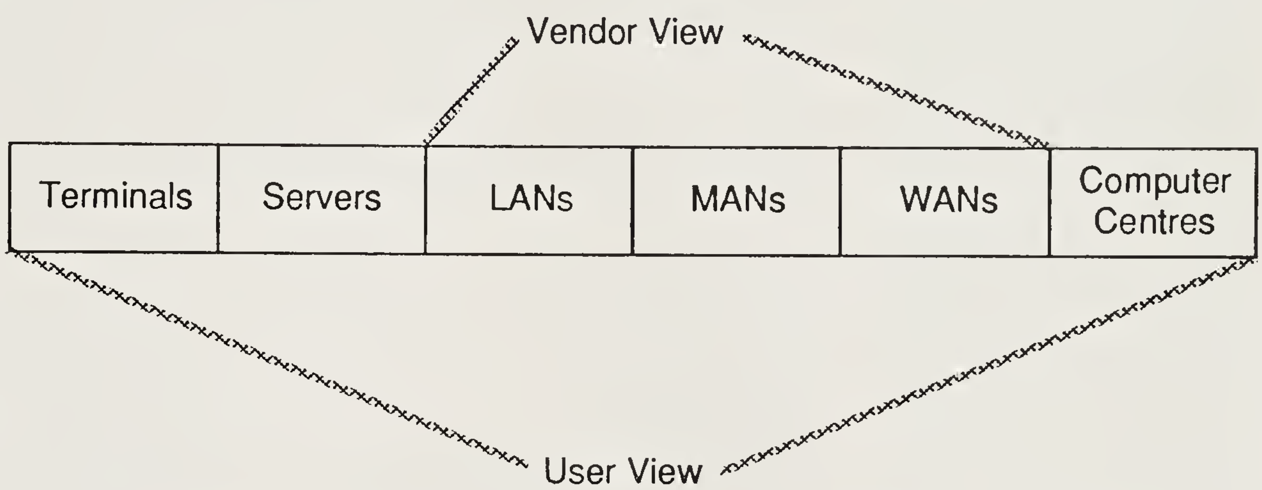
Options for Network Management

INPUT's report discusses the opportunities available for vendors in network management, which range from:

- Providing strategic feasibility studies to ascertain how far the network is meeting the requirements for the overall business direction
- Network implementation where networks are upgraded or new networks installed
- Providing management once the network is operational

INPUT's report discusses these opportunities and the factors upon which they depend, so that you can better target your sales and marketing activities.

Networks—A Wider View



- Internal view-user
  - Terminal end-user viewpoint on system
  - Servers, comp—OS networks—MIS concern
- External view—vendor tendency
  - Must widen his view to be aware of all facets of NM market

Competitive Positioning

Vendors in the network management market may find that they are competing against different types of companies offering different solutions. It is essential to be able to evaluate your company's position vis-à-vis your competitors and to understand the range of solutions being sold in the marketplace. INPUT's report discusses the potential contributions that various types of vendor can make to the network management market:

- PTTs
- Specialist carriers—for example, mobile radio, radiopaging and satellite broadcasting operators
- Independent network service providers
- IT equipment and telecommunications vendors
- Major professional services companies

It is vital that vendors be able to match solutions to users' requirements at a detailed level, and INPUT's report provides guidelines to help vendors ensure that the major issues are addressed.

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Systems Software Support Issues in Customer Services

Western Europe 1991-1996

Improve your systems software support service

Users of this report can:

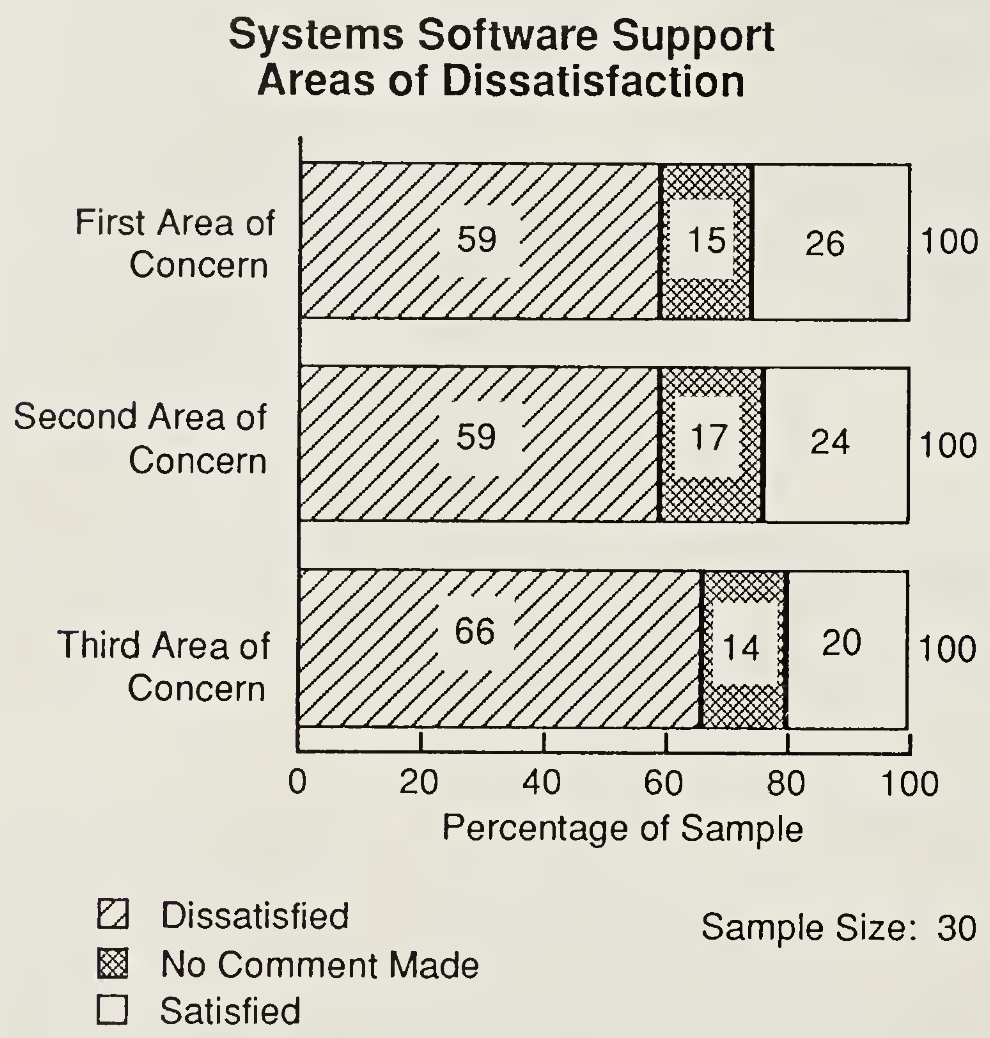
✓ Learn about user trends in customer satisfaction with system software support, based on four years of trend data from over 5,000 interviews

✓ Find out users' specific concerns with systems software support based on the results of 30 in-depth interviews

✓ Use INPUT's recommendations to address the issues successfully

INPUT's User Satisfaction Surveys

INPUT has been researching user satisfaction with the customer services market for over five years. As part of this research, users are asked questions about their satisfaction with systems software support.



Over the last four years, INPUT's research has shown that satisfaction with systems software support has been declining. Users are now expressing real concerns and worries over the quality of support they receive.

INPUT's new report, *Systems Software Support in Customer Services Western Europe, 1991-1996* analyses the reasons users are dissatisfied with systems software support and suggests strategies for service organisations to overcome the difficulties.

This report, based on four years of trend data, is essential reading for companies offering systems support services because knowing where the problems lie is the first step towards improving performance. INPUT's report reveals particular areas of user-perceived weakness, so service organisations can address them successfully.

Growth Forecasts for the Systems Software Support Market, 1991-1996

INPUT's report forecasts the growth of this market over the five-year forecast period 1991-1996 and evaluates the competitive scenario. As more industry standard software is adopted, opportunities are created for professional services vendors to enter the market and increase competition. It is therefore vital for service departments of equipment vendors to respond to the needs of their customers if they wish to retain them. INPUT's report provides valuable assistance for service vendors to re-evaluate the support they offer.

Trends in Customer Satisfaction with Systems Software Support

The report presents overall trends in customer attitudes over the four-year period 1987-1990, based on over 5,000 interviews. INPUT uses a satisfaction index to measure user satisfaction.

Order Form

INPUT's Research Studies

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Systems Software Support Issues in Customer Services—Western Europe, 1991-1996 report at the fee of $2,850 each.

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This is calculated by asking users to rate, on a scale of 1-10, how important systems software support is and then how satisfied they are with the support they receive. The difference between these two numbers provides a satisfaction index. For example, if a user gives an importance rating of 8 for systems software support, but a rating of 5 for satisfaction, the satisfaction index of 3 indicates that the vendor is not meeting the customer's requirements. The satisfaction index is useful in quantifying customer satisfaction.

In this report, INPUT presents comparative trend data for 10 of the leading equipment vendors, providing valuable competitive positioning information.

Find Out What the Areas of Concern Are

INPUT's report highlights three main areas of concern in user satisfaction with systems software support, as indicated in the research. For each of these areas, the report draws upon the results of 30 in-depth interviews where the issues are discussed at length.

Find out:

- Precisely what is causing user dissatisfaction
- The implications for vendors
- How to rectify the problems

Should Systems Software Support be Bundled or Unbundled?

INPUT's research has shown that no clear directions have been established with regard to this important strategic issue. INPUT's report analyses the factors influencing the decision of whether to bundle or unbundle software support and attempts to forecast the likely route that vendors will take over the next five years.

Report Contents

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User Satisfaction with Vendor Customer Services

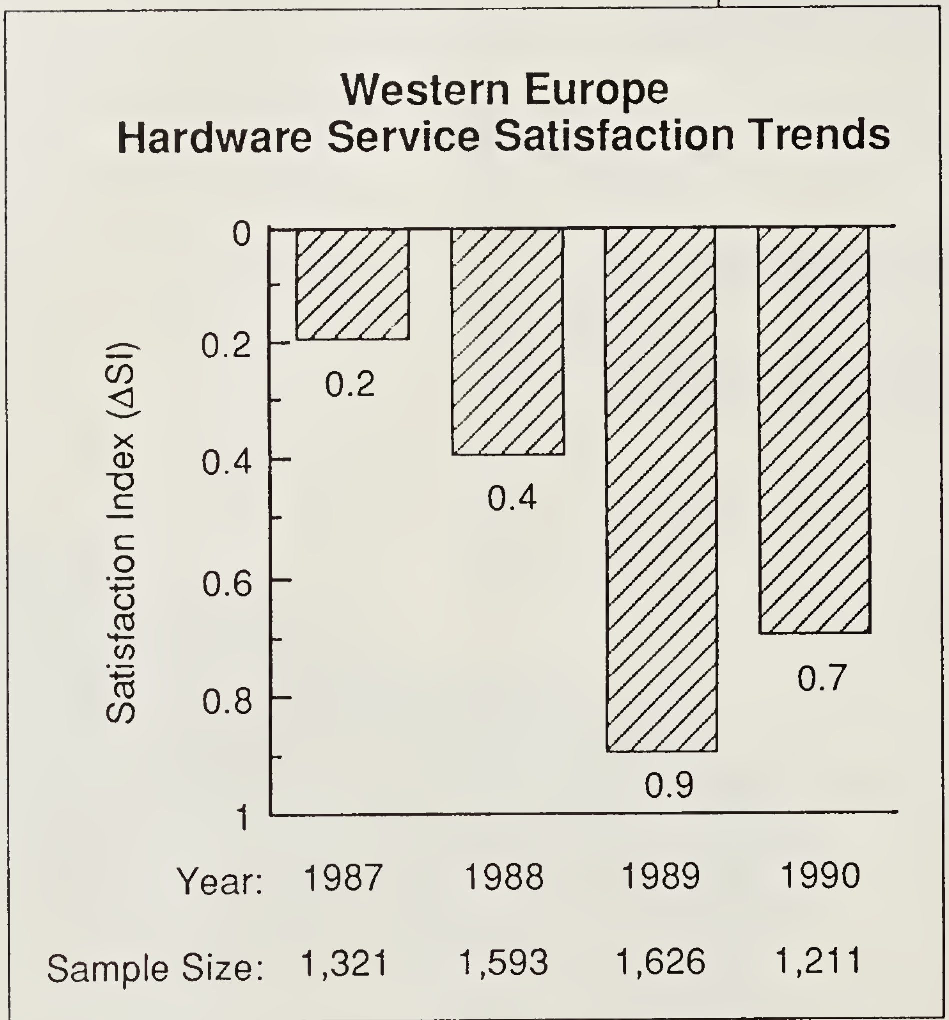
Trends and Issues in Western Europe, 1990

This report helps you understand users' views on the service your company and your competitors are providing.

- Compare this year's results with last year's
- Find out the areas of concern
- Learn which country markets are most vulnerable to user dissatisfaction

User Satisfaction with Customer Service

This report from INPUT presents a review of user satisfaction with customer service in Western Europe in 1990. It analyses the results of interviews conducted with computer users aimed at identifying key user issues relating to the perceived level of service provided by vendors. The data is based on over 1,200 interviews relating to some 150 aspects of service and support. In addition, INPUT conducted 30 in-depth interviews that revealed the key user issues covered in this report.



INPUT's analysis of these results—based on solid research—gives vendors the opportunity to better satisfy their users.

INPUT's report provides user satisfaction data for:

- Hardware Service
- Systems Software Support
- Systems Availability
- System Failure Rates
- Hardware Service Response and Repair Times
- Systems Software Support Response and Fix Times

You will also find out the differences in satisfaction among system sizes:

- Large Systems
- Medium Systems
- PCs and Workstations

INPUT's report, *User Satisfaction with Vendor Customer Services—Trends & Issues in Western Europe, 1990*, covers all the major issues in service across the three system sizes, giving you the total picture on which to base your planning. You will be able to identify specific problem areas, and thereby improve your service and your customers' satisfaction.

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User Satisfaction with Vendor Customer Services—Trends & Issues in Western Europe, 1990 report at the fee of $2,850 each.

The Western European Customer Services Market Analysis and Forecast, 1990-1995 report at the fee of $2,850 each.

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INPUT's Satisfaction Index

INPUT's satisfaction index provides you with a valuable way of measuring levels of satisfaction with various aspects of service. It is calculated by asking the user to rate on a scale of 0 -10 how **important** each service aspect is, and then how **satisfied** the user is with the vendor's performance. The difference between these two ratings provides the satisfaction index. The smaller the difference, the more satisfied the user.

Country Markets Covered

Belgium	Norway
France	Spain
Germany	Sweden
Italy	U.K.
The Netherlands	

The European coverage in the report means that you can identify specific differences between countries and therefore better target your efforts.

In-Depth Interviews

INPUT's in-depth interviews give greater insight into users' views about the service they are receiving. Only 53% of the sample expressed a level of satisfaction with hardware service without voicing some concern. INPUT's report reveals these concerns. The interviews provide:

- Comments from the users interviewed
- User views of vendors' strengths and weaknesses
- Quality of service ratings from users

The results of the interviews provide you with important feedback from your users.

Trend Data

INPUT's report presents trend data in a graphical form which allows comparisons to be made with previous years. Data is presented by system size and by vendor. There are also service performance comparisons by vendor.

You can therefore build an historical picture of your company's service performance against others—important competitive information.

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Western European Customer Services Market Analysis and Forecast

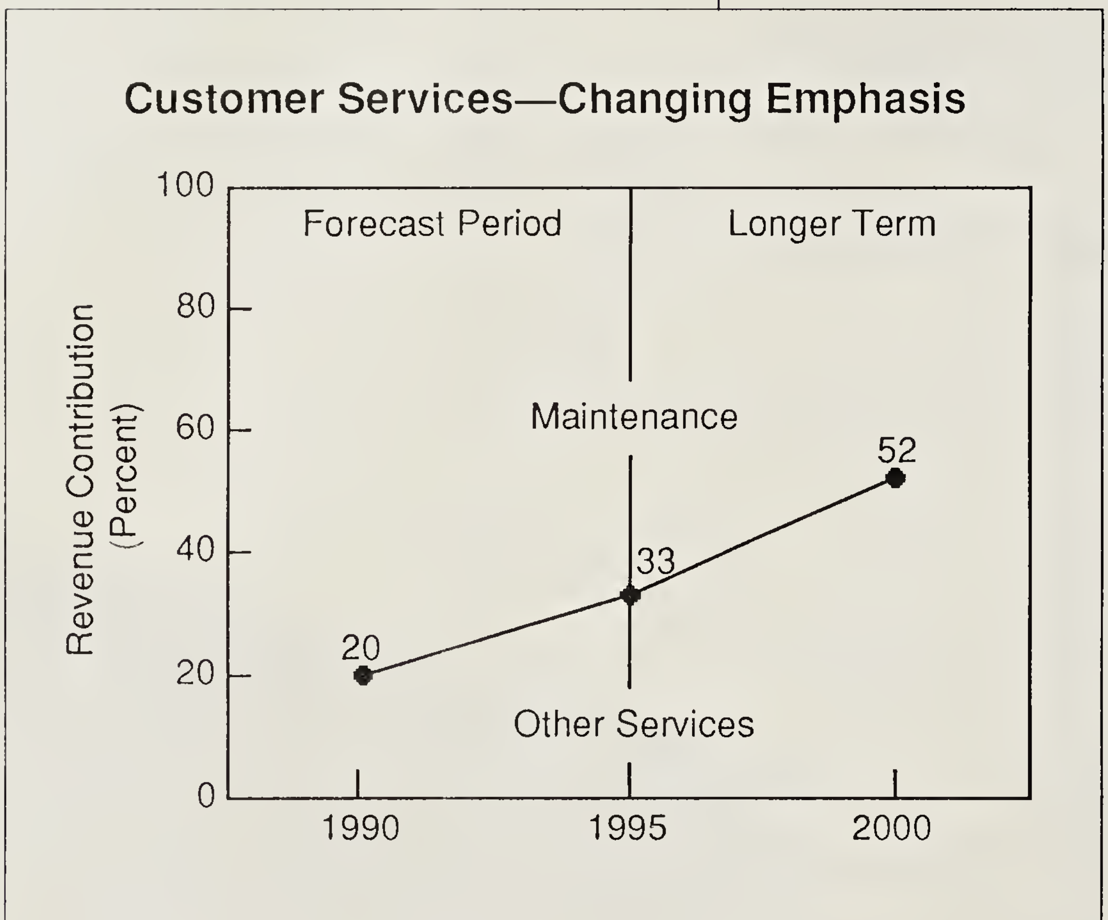
1990-1995

Use this report to find out:

- Market sizes and growth rates for customer services split by:
  - Country
  - Leading equipment vendor
  - Major service sector
- INPUT's view of how the market will develop over the next five years
- Penetration of the customer service market by independent vendors
- Competitive issues

Find Out User Expenditures in Customer Services

INPUT's latest report on the customer services market is invaluable to customer services executives in planning their strategies over the next five years. The report gives estimates of the market sizes and growth rates over the forecast period and splits the spend across four service sectors, so that you can see exactly where the best opportunities lie. These sectors are:



- Hardware Service
- Systems Software Support
- Professional Services
- Education and Training

Market shares for three vendor types are also listed:

- Equipment Vendors
- Independent Maintenance Vendors
- Dealers and Distributors

Long-Term Trends

You can find out how the market is likely to evolve over the forecast period and beyond, and learn what the long-term growth prospects are—vital market planning information.

The report addresses questions such as:

- Will independent vendors continue to increase market penetration?
- Will hardware maintenance revenues continue to decline?
- Are professional services still offering the opportunities to recover from lower hardware maintenance revenues?
- Does professional services present a key opportunity?

INPUT®

The answers to these questions will be found in INPUT's report, *Western European Customer Services Market Analysis and Forecast, 1990-1995*. The report provides customer services executives with the information they need to plan their businesses realistically to ensure success.

Competitive Insights

INPUT's report lists the revenues and market shares of the leading 15 equipment vendors. These vendors account for nearly 80% of total user expenditures, so this data gives you accurate competitive insights.

Country Market Details

The report gives market growth for 13 countries, enabling you to develop particular plans for individual country markets.

Austria	The Netherlands
Belgium	Norway
Denmark	Spain
France	Sweden
Finland	Switzerland
Germany	U.K.
Italy	Rest of Europe

Customer services executives can benefit from INPUT's data which is presented in many ways. Expenditure in each country market are listed by **service sector** (hardware service, systems software support, professional services, and education and training) and by **equipment vendor**. In addition, each of the leading 15 equipment vendors' revenues are presented by **country.**

Report Contents

- Market Definition
- Market Growth, 1990-1995
- Service Sector Growth, 1990-1995
- Market Growth by Vendor Type
- Country Market Growth
- Leading Equipment Vendor Customer Services Revenues
- Long-Term Trends

- Market Definitions
  - Service Vendor
  - Service Sector

- Customer Services Revenue Stream by Product Type

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VAR Markets and Support Issues in Western European Customer Services 1991

INPUT's new report provides equipment vendors with important information on the issues and trends in the indirect sales channel market:

- ✦ Partnership selection criteria
- ✦ Market drivers and inhibitors
- ✦ Vendor risks and responsibilities in using indirect channels
- ✦ Service trends for equipment sold via indirect channels
- ✦ Market size and growth rates

Channel Control

Selling equipment by indirect channels can create opportunities for equipment vendors to reach wider markets or specialised niche markets. However, if this route is to be successful, vendors need to keep firm management control of their partners.

INPUT's new report—*VAR Markets and Support Issues in Western European Customer Services, 1991*— discusses the issues involved in managing indirect channels to help equipment vendors plan their strategies in setting up the agreements.

The report discusses both value-added resellers (VARs) and dealers and distributors, and identifies the potential risks that vendors take on when setting up indirect sales channels. The choice of partner is critical to the success of the venture, and so the report gives guidelines on what vendors should take into consideration when evaluating potential partners.

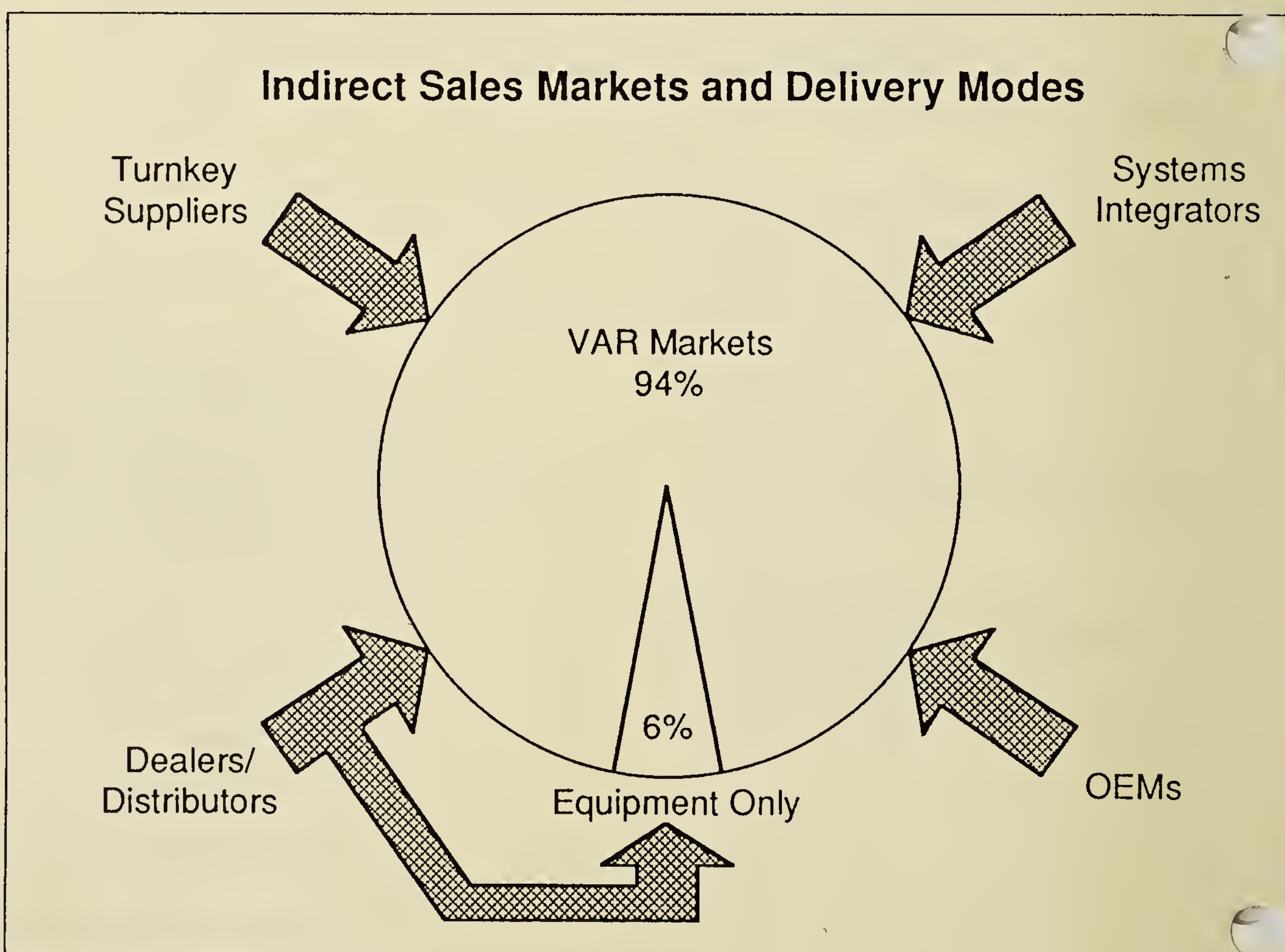
The report also discusses the potential problems that can arise with second- and third-level distributors, where there is a danger of even further distance between the equipment manufacturer and the user.

Channel Delivery Modes

The report identifies four major delivery modes for indirect equipment and software sales:

- Systems integrators
- Turnkey systems suppliers
- OEMs
- Dealers and distributors

INPUT's report discusses the offerings and market shares of each of these groups, providing you with a competitive picture of how the market is structured.



Find out the Driving and Inhibiting Forces in the Market

INPUT believes that there is potential danger in the original equipment vendor becoming isolated from the needs of its users, and also of the users becoming distanced from the expertise of the original manufacturers. The report discusses these issues and also the main driving and inhibiting forces in the market—important information for successfully managing your indirect sales channels. For example, one of the market drivers is the growing trend toward outsourcing information systems development in an attempt to reduce overhead and focus on the primary business activity. INPUT's report discusses the implications of this trend for equipment vendors, providing important insights into this market.

This market is complex, and the segmentation boundaries are somewhat blurred. INPUT's report can provide equipment vendors with the information they need in order to plan their strategies in this market.

Market Share Information

INPUT's report examines the market for specialised packaged solutions and the market for indirect sales of computer equipment. It also provides market share figures for different types of vendors and estimates the percentage of equipment that is sold via indirect channels, and the percentage of indirect sales that come from dealers and distributors.

The report also estimates the revenue contributions that various equipment manufacturers derive from indirect sales channels.

Servicing Trends

Indirect sales partners are encouraged to provide service from the original vendor, and INPUT's report discusses the reasons for this trend and its implications for vendors and users. The report also reveals the most usual conditions that equipment vendors impose on VARs that perform their own servicing.

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Report Contents
Channel Delivery Modes and Support Requirements
• Marketing Channels • Third-Party Delivery Modes • Dealer/Distributor Channels • Equipment Vendor Dealer/Distributor Considerations • Support of Third-Party Channels
Channel Opportunities and Trends
• Importance of Indirect Sales • Benefits and Risks • Training and Support • Vendor Preferences • Warranty Trends
Specialised Packaged Computing Solutions
• Market Structure • Turnkey Systems Market Growth, 1991-1996 • Systems Integration Market Growth, 1991-1996
VAR Packaged Solution Markets
• Indirect Sales Channel Markets • Market Drivers and Inhibitors • VAR Channels and VAR Market Share • Impact of UNIX • Customer Services Revenues in VAR Markets, 1991
Tactical Approaches to Channel Markets and Support
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January 24, 1991

Information Systems
Executive Mail List

Dear Colleague:

There is a major trend toward the outsourcing of information systems as reported at industry conferences and in the press. A new service introduced by INPUT offers information for intelligent analysis of the outsourcing alternatives available to you.

The *Outsourcing of Information Systems Program* provides objective information and analysis on the rapidly changing array of outsourcing alternatives. Focused on the practical aspects of the issue, the program is designed to support executives by providing:

- Timely analysis of user and vendor developments related to outsourcing through research bulletins, vendor profiles, and case studies analyzing new and ongoing outsourcing contracts.

- Access to INPUT's consulting staff to address your specific inquiries on outsourcing issues.

INPUT has an established reputation as the leading research and consulting firm in the area of outsourcing, and has been analyzing developments in the area for over 15 years. Consequently, you will find the information provided through this service meaningful, whether you are currently considering outsourcing or are simply monitoring developments in the area.

The enclosure provides more details. I encourage you to look it over and register for the *Outsourcing of Information Systems Program* today.

Sincerely,

Dennis Wayson

R. Dennis Wayson
Vice President

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Provides direction and analysis on the rapidly changing outsourcing choices in data center operations, network operations, systems development, applications support and other areas.

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Research Bulletins:	Frequent (every 2 weeks, on average) summaries of research projects, analyses of events and opinions on issues from experts.
Vendor Profiles:	Descriptions of outsourcing vendors, their characteristics, users and directions.
Case Studies—Initiation:	Examples of the use of outsourcing, including reasons for choice, vendor selection and financial characteristics.
Case Studies—Operations:	Description of outsourcing operations, including satisfaction levels, benefits and drawbacks.

SERVICE ELEMENTS:

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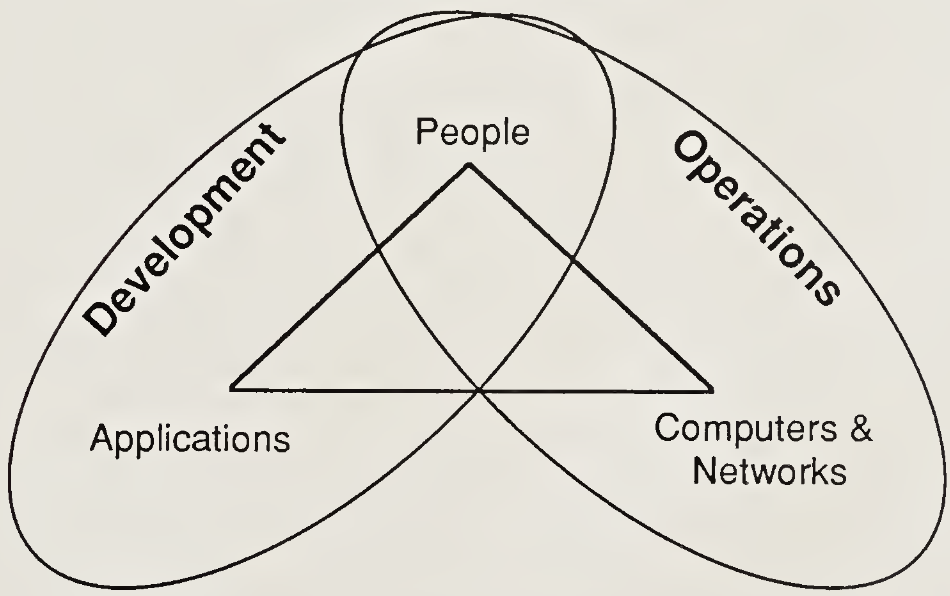

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If You Want To Know Exactly How New Technologies Are Making It in the Real World…

- What are the issues in RDBMS implementation?
- How important are CASE tools in today's IS operations?
- What role is AI playing in IS these days?
- What are user objectives for data center management?
- How effective are the various kinds of networking technology?

. . . You'll Need INPUT's New Report on New Technology Implementation!

When new technologies are first introduced, they often sound like they'll do everything but cure the common cold. How they actually perform in the real world, however—the world of IS departments with real challenges in applications development and data center management to meet—is usually another story.

That's the story INPUT's new report on *Managing Information Technology in the 1990s* gives you. The report is the result of a months-long effort by a team of researchers with experience as both users and vendors of new technology and is designed to give you the truth behind the sometimes inflated claims made for untested technologies.

Managing Information Technology in the 1990s
Technology Issues
• Implementation Inhibitors • General Management vs. IS Management • Implementation Effectiveness
Image Processing, CASE, Applications Development, Data Center Management
• Status • Issues • Effectiveness
Recommendations

The report would be a bargain at full price. But INPUT wants to offer you an even better deal.

Buy the report before January 31, 1991, and you'll pay $250 less than the regular list price for the report—a savings of 10 percent!

INPUT's research team knows which questions to ask to uncover the truth about how these technologies are actually being used. And that kind of information can give your company a significant competitive advantage.

The Key Technologies

From a list of hundreds of technologies, INPUT chose the ones that offer the most potential to change the way IS departments operate:

- Artificial intelligence/expert systems
- CASE tools
- Cooperative processing
- Distributed data base management systems
- Imaging
- Networking (LANs, WANs, MANs)
- Object-oriented programming systems
- Relational data base management systems
- SAA
- UNIX and open systems
- Data center operations

These are the developments we keep hearing about. But we rarely hear about how they work in the world *you* work in every day.

How Are They Really Used?

For each of these promising new technologies, INPUT's report determines to what degree their promise has been realized:

- Is interest in CASE really waning?
- How fast is distributed data base management technology being adopted?

Top Management vs. IS Management Inhibitors

- Who is driving the implementation of UNIX and open systems technology? How active is the typical IS organization in this effort? How do they rate its effectiveness, and why?
- What are the major trends in imaging? In what kinds of applications is it being used today? What are organizations' future plans for imaging technology?
- How are LAN, WAN, and MAN technologies being used today? What are organizations' plans for them in the future?
- How do IS managers rate the effectiveness of networking technology in their businesses?
- How are IS departments incorporating artificial intelligence and expert systems into their technology mix?
- What new ideas for meeting the maintenance challenge have been proposed? How has IS reacted?
- What are the ultimate objectives of the IS organization for data center management?

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More than just a popularity profile, this evaluation focuses on the central issues governing the acceptance of any new product or practice. How effective is it? How well does it help management solve the problems it was designed to solve? What are the inevitable issues accompanying its implementation that must be addressed?

These issues will probably play a central role in determining the ultimate effectiveness of the new technologies, so INPUT devotes much research energy to addressing them. In applications development, for example, the report ranks the five issues users find critical. INPUT then asks IS managers to quantify the time they spend developing new applications versus maintaining old ones. Within this context, the report goes on to analyze the major strategies IS is now using to address a crucial problem: the control and allocation of maintenance resources.

This kind of in-depth analysis is typical of the entire report. *Managing Information Technology in the 1990s* doesn't just give you facile generalizations. It gives you detailed, informed examinations of exactly how new technologies are faring in the real world.

This is the kind of in-depth, behind-the-scenes information that can make a tremendous difference to both user and vendor companies trying to evaluate how new technologies might actually fit into *their* world.

So get the best factual data and most penetrating analysis of new technology available. Use the enclosed form to order your copy of INPUT's report on *Managing Information Technology in the 1990s* today.

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Gain Insights into Users' Viewpoints on Systems Integration...

Find out:

- The relationship between users and vendors
- The role of user information systems departments
- Reasons for SI project failure
- Vendor selection criteria
- User satisfaction

Systems Integration User Issues—Western Europe, 1990-1995

This new report from INPUT discusses the systems integration market from the users' point of view. It describes the reasons why users outsource their information systems development to an external vendor, and discusses the factors influencing the choice of vendor.

Report Contents

Systems Integration—INPUT's Definition

Systems integration is a business offering that provides a complete solution to an information system, networking, or automation requirement through the custom selection and implementation of a variety of information systems products and services. A systems integrator is responsible for the overall management of a systems integration contract and is the single point of contact and responsibility to the buyer for the delivery of the specified system function, on schedule and at the contracted price.

Potential Problems with Systems Integration Projects

INPUT's research shows there is a potential problem with the user/vendor relationship during systems integration projects. Responsibility for project management of the vendor frequently falls between top management and the in-house information systems department. Both of these groups have different strengths and weaknesses in managing the vendor of a large project.

It is vital that the initial system specification is adequately drawn up, and INPUT's report describes some of the pitfalls that have occurred at this crucial stage.

The Buying Process

INPUT's report describes why users outsource the development, or realignment, of information systems and discusses the role and the different requirements of the various departments that are typically involved in the buying cycle. Systems integration vendors can therefore gain valuable information from INPUT's report on the buying cycle of clients.

INPUT's research has shown that the role of the in-house information systems department is changing, and the report discusses the implications of this shift for vendors.

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Competitive Insights

INPUT's report discusses user-perceived strengths and weaknesses of the three vendor types that are active in the systems integration market:

- Management Consultancies
- Major Equipment Vendors
- Professional Services Vendors

User Satisfaction

INPUT's report highlights some of the reasons why users believe systems integration projects fail, and some of the reasons why using an external vendor can be highly satisfactory. The report also compares and contrasts the degree of satisfaction reported by users between large-systems integration projects and smaller professional services projects.

Pricing Issues

INPUT's report can help vendors reconsider the various pricing options in systems integration contracts. Pricing is often problematical and the report discusses the implications of fixed-price and time-and-materials costings.

Factors in Vendor Selection

Nature of Project	Key Factors
Systems Integration	Board-level decision Spin-offs from audits/studies Vendors judged on strategic capabilities Limited evaluation of implementation skills
Professional Services	Experience of vendor Detailed evaluation of capabilities Location

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- ▲ What strategies are the leading vendors pursuing?
- ▲ How will the recession affect system development?
- ▲ How big will various market segments be five years out?
- ▲ What technologies will change your market position?

...You Need the Research and Analysis in INPUT's New Report!

You need targeted market intelligence on large-scale trends and tactical opportunities in applications software products and turnkey systems. And INPUT has just published a report, entitled *U.S. Application Solutions Market, 1990-1995*, that is designed to give you that intelligence now, when it can offer you the greatest possible competitive advantage.

U.S. Applications Solutions Market, 1990-1995
General Business Climate
• General Economic Climate • Information Services Industry Issues and Climate • Application Solutions Business Issues and Trends
Market Forecast
• Market Overview • Driving Forces • Forecast by Platform Size and Submode • Industry and Cross-Industry Sector Forecasts
Issues and Trends
• Shifting Technology Foundations • Changing Buying Patterns • Price Investment Pressure • Changing Distribution Channels • Importance of Value-Added Services • Market Specialization • Future Issues and Trends
Competition
• Competitive Strategies • Shifting Market Structure • Vendor Profiles
Conclusions and Recommendations

The markets for applications solutions are changing rapidly. Market forces, technological developments, and competitive trends are all acting together—sometimes in contradictory ways—to transform the way companies decide to acquire solutions of all kinds.

INPUT's report gives you an in-depth examination of all these changes, allowing you to make informed decisions about where you should concentrate your technical, marketing, and sales resources. And for a limited time, we are offering *U.S. Application Solutions Market, 1990-1995* to you at a considerable savings.

If you order before March 8, 1991,
you'll pay $300 less than the regular list price
for the report—10 percent off!

INPUT's experts have decades of experience as both buyers and vendors of applications solutions. They have watched the market grow, mature, fragment, consolidate, and continue to change. Nothing throws them. And they have put this expertise to work for you in a report that can answer all of your questions about a very complex field.

Large-Scale Trends

The report offers primary research and informed analysis of both large trends and more localized trends in these markets. The broader questions it addresses include:

- What two contrary effects will economic uncertainty have on applications solutions market growth?
- How fast will these markets grow—by platform size (mainframe, minicomputer, workstation/PC) and submode (equipment, applications software products, systems software, professional services)?
- How will the drive toward standardization affect the market in the short term? In the long term?
- What are the slowest growing industry-specific markets? The fastest?
- Which cross-industry market is growing fastest?
- What role will alliances play in today's complex markets?

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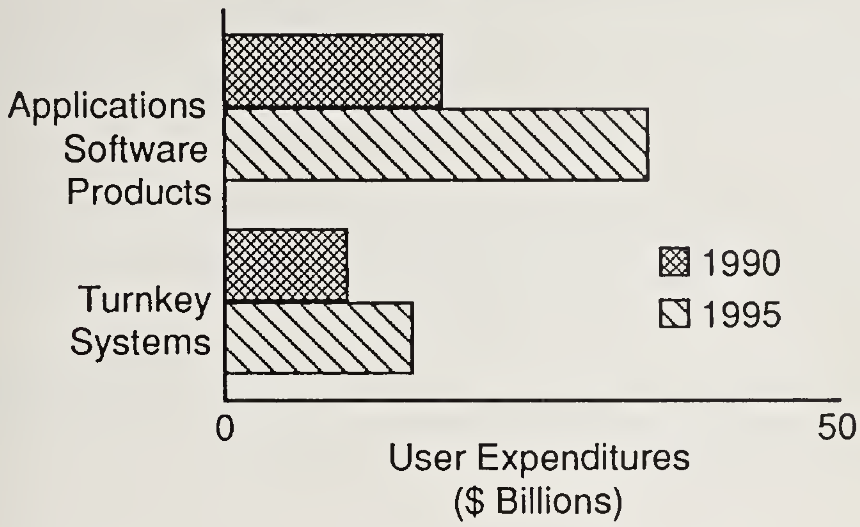
Applications Software Products and Turnkey Systems User Expenditures, 1990-1995



INPUT'S PROJECTION for these two markets reflects the strength of applications software products versus turnkey systems.

- Who are the leading vendors, and what did they do to achieve prominence?
- How are leading vendors' competitive strategies changing?
- Where are the incremental opportunities offered by economic uncertainty?
- How have pressures for CASE tools, graphical user interfaces, RDBMSs, and standards slowed the market?
- Which kinds of systems are targeted for accelerated development in a recessionary economy? Which are targeted for cancellation?
- How has the shift from mainframes to minis to PC/workstations affected this market?
- What impact will the move toward client/server architectures, LANs, and open systems have on these markets?
- What kind of growth opportunities will they offer?

And more on the major changes that are affecting vendors who want to provide focused, cost-effective solutions to their customers.

Tactical Advantage

The report also gives you a tactical advantage by answering more narrowly defined questions:

- What changes in buying patterns are favoring application solution vendors?
- What changes are working against them?
- How are users' desires for solutions rather than products transforming the market?
- How will the various distribution channels be affected by customers' desires for a single point of contact and comprehensive integration services?
- Which are the fastest growing industry-specific market sectors for applications software products and turnkey systems?
- Which are the fastest growing cross-industry market sectors?
- How can you compete in a market characterized by open systems and portability?

Plus a full set of conclusions and recommendations about the changing nature of the marketplace and how you can best deploy your resources to take advantage of new opportunities.

U.S Application Solution Market, 1990-1995 distills comprehensive research and decades of experience into a strategic tool you can use to help you gain competitive advantage in this complex market.

And all you have to do to get this advantage is use the enclosed order form to get your copy of *U.S. Application Solutions Market, 1990-1995* today.

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YES! I need targeted intelligence on the applications solutions markets. I need INPUT's report, *U.S. Applications Solutions Market, 1990-1995.*

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Send me ________ copy (copies) of INPUT's report, *U.S. Applications Solutions Market, 1990-1995* at the fee of $2,995.

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(CHOOSE ONE)

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Find Out Why Users Adopt Systems Operations

And:

- How the systems operations market is segmented
- Vendor selection criteria of purchasers for each market segment
- Perceived suitability of equipment vendors, management consultancies, and professional services vendors to serve each market segment
- Levels of user satisfaction and the main causes of user dissatisfaction

Find Out in INPUT's New Report

Systems Operations User Issues—Western Europe, 1990-1995

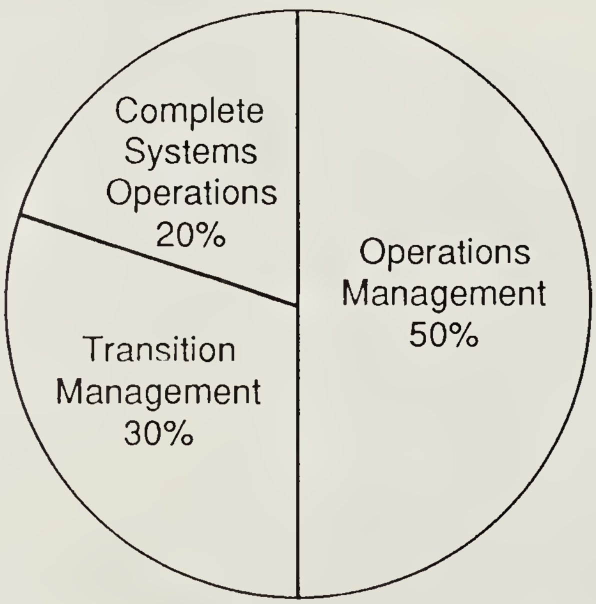
Systems operations, or facilities management, involves the operation and management of all or a significant part of the user's information systems functions under a long-term contract.

INPUT's report can assist vendors of systems operations services, or vendors wishing to enter the market, in understanding users' reasons for adopting system operations and what factors influence their selections of vendors.

Systems Operation Market Segmentation

INPUT has identified three market segments for systems operations, each displaying its own unique combination of reasons for purchase and vendor selection criteria.

Western European Systems Operations Types of Service



Sample of 12 European systems operations users

INPUT estimate

The market segments are:

Operations Management

The user outsources the operation of the computer equipment, but retains full control of applications maintenance and development. The equipment, most commonly mainframe-based, is typically transferred to the vendor's site.

Transition Management

The vendor manages the user's existing system while new systems are developed.

Complete Systems Operations

The user outsources both the management of existing information systems and the development of new ones to the same vendor.

For each of these segments, INPUT's report provides:

- Vendor selection criteria
- Vendor positioning—which vendors are best suited to each segment
- Switching criteria—what factors prompt users to consider a change of vendor
- User likes and dislikes about their vendors
- INPUT's estimate of the percentage of users adopting each type of service

Vendors can use INPUT's report to help them identify their competitive positions. Vendors can also find out users' opinions about systems operations and the resulting implications. The report can help vendors better satisfy their current users and better target new prospects.

Find Out the Pressures that Lead to Systems Operations Contracts

Pressures such as decentralisation are driving the systems operations market in Europe—for example, the U.K. health authorities are moving from centralised regional systems to local systems in line with government policy to devolve responsibility to hospital and district level.

Report Contents
The Buying Process

Pressures for Adopting Systems Operations
Types of Systems Operations Service
    Market Segmentation
    Operations Management
    Transition Management
    Complete Systems Operations
    Public Sector Issues

Purchasing Criteria
    Overall Criteria
    Operations Management & Transition Management
    Complete Systems Operations

Perceived Suitability of Vendors
    Overall Suitability of Vendor Types
    Perceptions of Management Consultancies
    Perceptions of Major Equipment Vendors

User Satisfaction
    Overall Level of Satisfaction
    Causes of Satisfaction
    Causes of Dissatisfaction
    Switching Criteria
    Inhibitors to Systems Operations

Implications for Vendors
Operations Management Transition Management Complete Systems Operations

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In the private sector, too, many organisations are decentralising in an effort to make each subsidiary more accountable for its core business. Such decentralisation is frequently accompanied by a major realignment of information systems and a downsizing of equipment used.

INPUT's report discusses this and other factors that are driving the systems operations market. Interestingly, decentralisation can also be viewed as a market inhibitor. The report lists the six major reasons why users adopt systems operations, and also the reasons that are unique to each of INPUT's three market segments.

What Are the Implications for Vendors?

The report relates its user research to vendors and assesses the likely direction that the market will take. Systems operations is still not readily accepted by the majority of user bases, and the number of prospects available to vendors is limited. INPUT's report can help you make the best of the opportunities available.

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Find Out the Latest Developments in European EDI Markets

INPUT's report provides:

* A unique analytical market assessment tool
* Market size, forecasts and growth rates
* Industry sector penetration
* Discussion of market issues
* Recommendations for vendors and users of EDI

Variable Market Size and Growth

Variable EDI market size and growth in Europe means that vendors of EDI products and services need intelligence data in order to accurately target their sales and marketing efforts.

INPUT's report, *The Western European EDI Market*, provides the information that vendors need in order to make strategic marketing decisions.

This dynamic, high-growth market offers exciting opportunities to those vendors who are best able to target their products and services to the different requirements of various countries and industry sectors. You will be able to use INPUT's report to find out which markets are growing the fastest and to learn about the regulatory and driving and inhibiting forces affecting the EDI market.

INPUT's report examining the impact of EDI on the European software and services industry is essential reading. It provides, in a single volume, an accurate assessment of the climate in the major European country markets, so that you can find out which countries offer the best openings for your products and services.

Use INPUT's Unique Analytical Tool

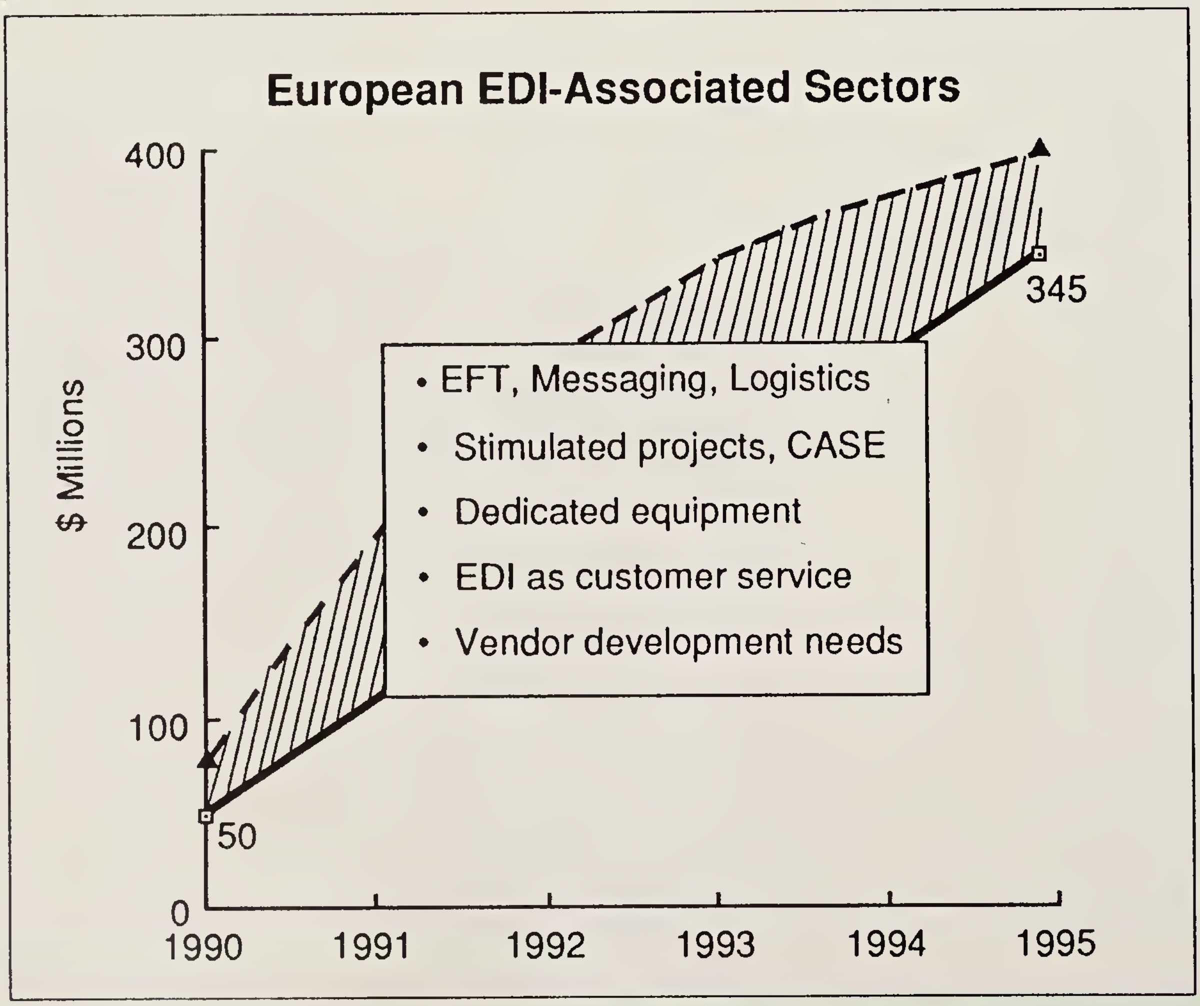
The report contains the EDI INPUT-OUTPUT Matrix to assist vendors in assessing their competitive positioning. It sets out, in a easy-to-read, matrix format, details of who communicates with whom in various industries and indicates the levels of requirement for EDI products and services. It also lists major EDI projects. Vendors can use this tool to see how their company's products and services can best meet the needs of their customers.

European Market Coverage

INPUT's report covers the following country markets:

U.K.
France
Germany
Italy
Scandinavia
Benelux
Spain
Rest of Europe

One of the major strengths of INPUT's research is its European coverage, enabling you to compare activities in the various country markets and identify emerging trends. Europe-wide knowledge is particularly important for vendors of EDI products and services, as there is an ever-increasing need for communication across European countries.



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Report Contents

EDI and Related Application Areas

- Reasons for using EDI
- Approaches to EDI networking
- EDI software solutions
- Relationships between EDI and other application areas
  - EDI and electronic mail
  - EDI and on-line order entry systems
  - EDI and electronic funds transfer
  - EDI and logistics
  - Other forms of EDI
  - EDI, data bases and internal applications
  - EDI and manufacturing

Market Analysis and Forecast

Market Environment

- Network environment
- Critical mass
- Standards
- Cost benefits
- National versus international
- Industry associations
- Issues:
  - Security
  - Legal
  - Management Issues
  - Pricing Trends
  - Interworking
- Competitive environment
- Network services software
- Professional services
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- The role of banks

Country Market Analysis

- U.K.
- France
- Germany
- Italy
- Scandinavia
- Benelux
- Spain
- Rest of Europe

EDI in the 1990s

Vendor recommendations

User recommendations

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EDI and Its Relationship with Other Software and Services Markets

The report provides discussion of the relationship between EDI and other software and services sectors, such as on-line order entry systems and electronic mail. Once the implementation of EDI widens, its effects on the rest of the software and services industry will be significant. Major development initiatives are discussed, such as EDIFACT and X.400 standards, as well as issues, such as security and pricing trends.

EDI and the Future

The report concludes with an assessment of the status of EDI in 1990 and a forecast of its likely development during the 1990s. The report provides recommendations to vendors of EDI products and services to help increase their market penetration. The report also advises factors to take into consideration when planning to implement EDI.

INPUT's EDI report can make a valuable contribution to your market planning.

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Systems Software Support Issues in Customer Services

Western Europe 1991-1996

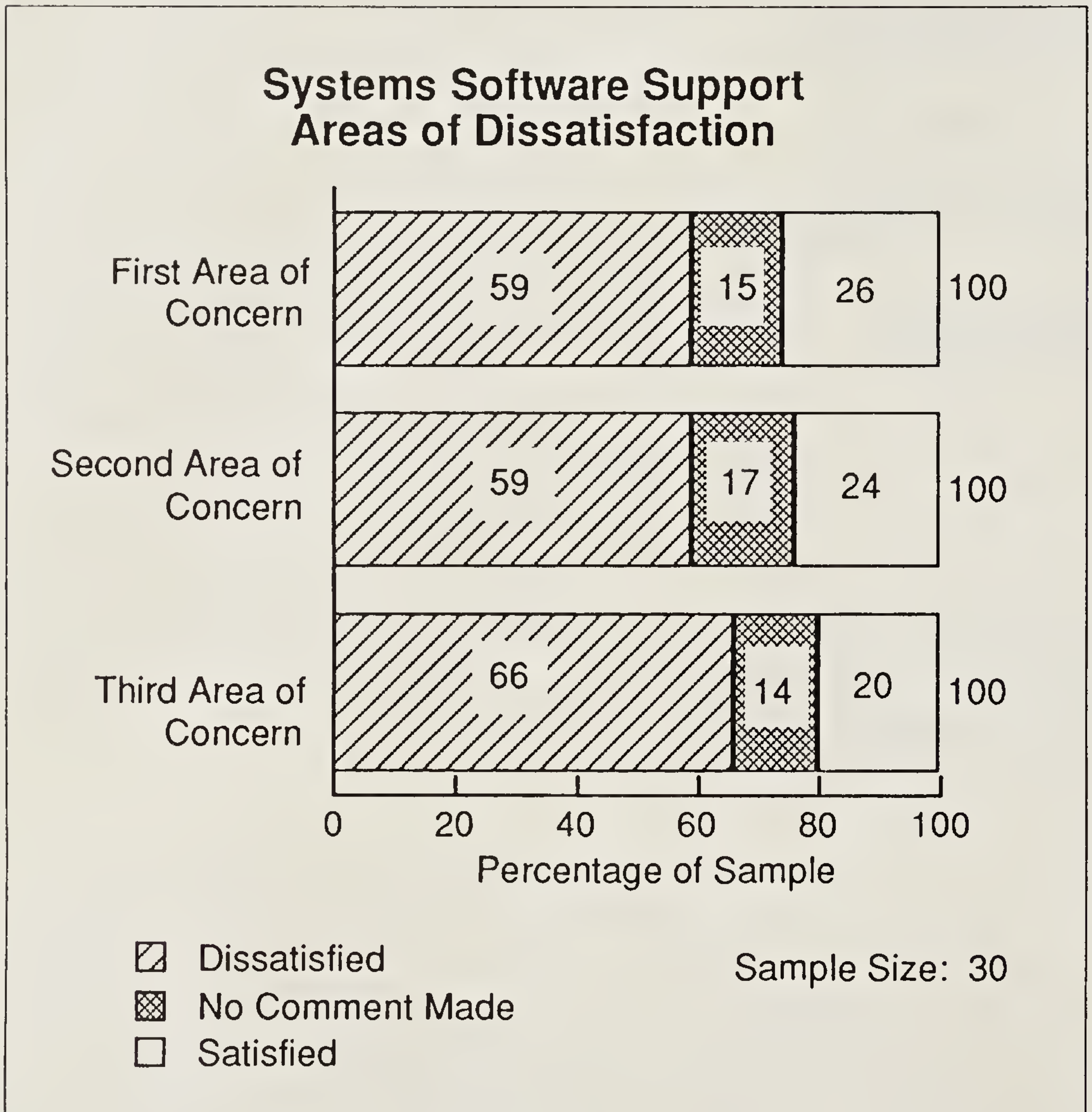
Improve your systems software support service

Users of this report can:

- ✓ Learn about user trends in customer satisfaction with system software support, based on four years of trend data from over 5,000 interviews
- ✓ Find out users' specific concerns with systems software support based on the results of 30 in-depth interviews
- ✓ Use INPUT's recommendations to address the issues successfully

INPUT's User Satisfaction Surveys

INPUT has been researching user satisfaction with the customer services market for over five years. As part of this research, users are asked questions about their satisfaction with systems software support.



Over the last four years, INPUT's research has shown that satisfaction with systems software support has been declining. Users are now expressing real concerns and worries over the quality of support they receive.

INPUT's new report, *Systems Software Support in Customer Services Western Europe, 1991-1996* analyses the reasons users are dissatisfied with systems software support and suggests strategies for service organisations to overcome the difficulties.

This report, based on four years of trend data, is essential reading for companies offering systems support services because knowing where the problems lie is the first step towards improving performance. INPUT's report reveals particular areas of user-perceived weakness, so service organisations can address them successfully.

Growth Forecasts for the Systems Software Support Market, 1991-1996

INPUT's report forecasts the growth of this market over the five-year forecast period 1991-1996 and evaluates the competitive scenario. As more industry standard software is adopted, opportunities are created for professional services vendors to enter the market and increase competition. It is therefore vital for service departments of equipment vendors to respond to the needs of their customers if they wish to retain them. INPUT's report provides valuable assistance for service vendors to re-evaluate the support they offer.

Trends in Customer Satisfaction with Systems Software Support

The report presents overall trends in customer attitudes over the four-year period 1987-1990, based on over 5,000 interviews. INPUT uses a satisfaction index to measure user satisfaction.

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This is calculated by asking users to rate, on a scale of 1-10, how important systems software support is and then how satisfied they are with the support they receive. The difference between these two numbers provides a satisfaction index. For example, if a user gives an importance rating of 8 for systems software support, but a rating of 5 for satisfaction, the satisfaction index of 3 indicates that the vendor is not meeting the customer's requirements. The satisfaction index is useful in quantifying customer satisfaction.

In this report, INPUT presents comparative trend data for 10 of the leading equipment vendors, providing valuable competitive positioning information.

Find Out What the Areas of Concern Are

INPUT's report highlights three main areas of concern in user satisfaction with systems software support, as indicated in the research. For each of these areas, the report draws upon the results of 30 in-depth interviews where the issues are discussed at length.

Find out:

- Precisely what is causing user dissatisfaction
- The implications for vendors
- How to rectify the problems

Should Systems Software Support be Bundled or Unbundled?

INPUT's research has shown that no clear directions have been established with regard to this important strategic issue. INPUT's report analyses the factors influencing the decision of whether to bundle or unbundle software support and attempts to forecast the likely route that vendors will take over the next five years.

Report Contents

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Network Management as a Systems Operations Outsourcing Opportunity—Western Europe 1991-1996

This report is essential reading if you want to win outsourcing contracts for managing networks. INPUT's report:

- ✦ defines this misunderstood area
- ✦ sizes the market
- ✦ identifies a three-stage outsourcing cycle
- ✦ discusses user and vendor perceptions of networks
- ✦ provides concrete recommendations to vendors hoping to win outsourcing contracts for managing networks

Network Management—A Major Outsourcing Opportunity

The outsourcing of information systems management is greater as user organisations come under increasing cost and resourcing pressures. INPUT has just completed research into a specialised area of outsourcing, network management, to help vendors plan their strategies in this market.

Report Contents
Market Definition
• Systems Operations Market Sector • Outsourcing • The World Market • The European Market • Positioning Parameters • Market Positioning—User Viewpoint • User Perspectives on Systems Operations • System Aspects • Market Positioning—Outsourcing • Vendor Activity • Outsourcing Market Analysis • European Analysis and Forecast • Market Evolution
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• Network Management Described • Network Management Functions • Organisation of Network Management • Network Management Issues
Conclusions and Recommendations

INPUT's new report, *Network Management as a Systems Operations Outsourcing Opportunity—Western Europe, 1991-1996* provides vendors planning to offer a network management service with important information on how best to approach this market. INPUT's research has found that this market is largely misunderstood and hence suffers somewhat from loss of visibility. INPUT's report clarifies the current market position and discusses the opportunities available for vendors, providing important planning information.

INPUT believes that this sector offers major opportunities for outsourcing contracts; the market is expected to increase at a compound annual growth rate of over 25% per annum. However, in order to take advantage of the opportunities, vendors need to understand the scope and definition of network management. INPUT's report clarifies where the opportunities lie and defines the scope of the network management market so that vendors can make the most of it.

Networks are becoming increasingly important components of user's information systems, which are key to the user's business. As users are becoming more open to the concept of outsourcing the operation of their information systems, factors such as lack of in-house resources and increasing network complexity are influencing the decision to outsource the management of the network. INPUT's report discusses this and other trends affecting the network management market.

Network management contracts can cover the management of the user's network only, or they can be part of a contract covering the rest of the user's information systems centre, which includes the network. INPUT's report sizes the market for both of these opportunities.

Users and Vendors Differ in Defining Networks

INPUT's research has shown that users tend to view a network as including any component of the network. Vendors, however, take a narrower, product-based view, which could become an inhibiting factor in deciding the scope of network management contract. Being aware of potential problems such as this can help you avoid some of the pitfalls.

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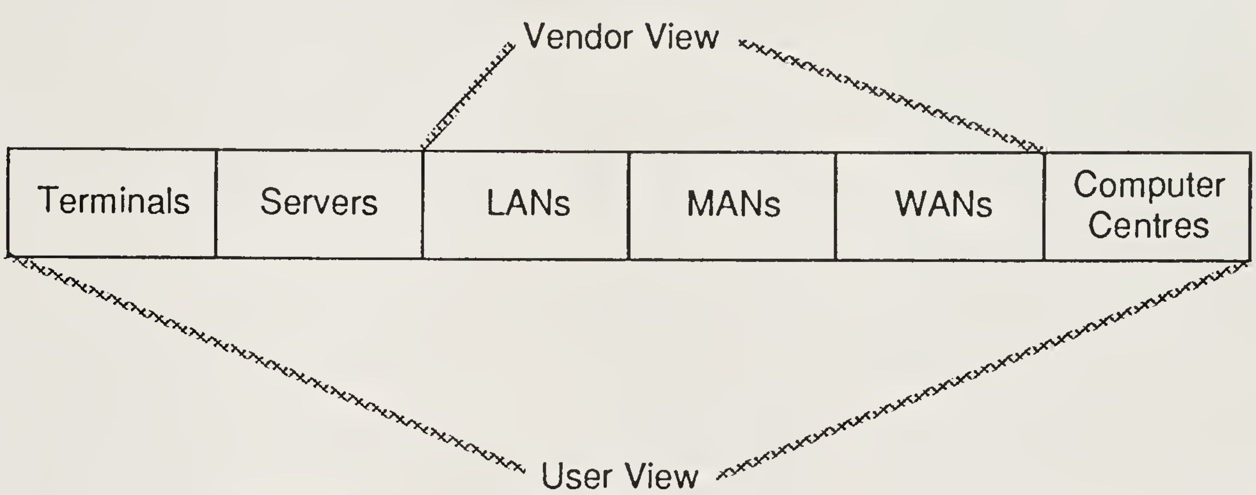
Options for Network Management

INPUT's report discusses the opportunities available for vendors in network management, which range from:

- Providing strategic feasibility studies to ascertain how far the network is meeting the requirements for the overall business direction
- Network implementation where networks are upgraded or new networks installed
- Providing management once the network is operational

INPUT's report discusses these opportunities and the factors upon which they depend, so that you can better target your sales and marketing activities.

Networks—A Wider View



- Internal view-user
  - Terminal end-user viewpoint on system
  - Servers, comp—OS networks—MIS concern
- External view—vendor tendency
  - Must widen his view to be aware of all facets of NM market

Competitive Positioning

Vendors in the network management market may find that they are competing against different types of companies offering different solutions. It is essential to be able to evaluate your company's position vis-à-vis your competitors and to understand the range of solutions being sold in the marketplace. INPUT's report discusses the potential contributions that various types of vendor can make to the network management market:

- PTTs
- Specialist carriers—for example, mobile radio, radiopaging and satellite broadcasting operators
- Independent network service providers
- IT equipment and telecommunications vendors
- Major professional services companies

It is vital that vendors be able to match solutions to users' requirements at a detailed level, and INPUT's report provides guidelines to help vendors ensure that the major issues are addressed.

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If You're Bidding on Federal SI Procurements, You Need a Lot More Information than You'll Find in the RFP...

- ➥ What are the forces driving the federal systems integration market?
- ➥ Why is teaming important in this field?
- ➥ What are the key selection criteria of major agencies?
- ➥ How big is the market, and how fast will it grow?
- ➥ What improvements do agencies want most?

...You Need the Market Data and Analysis in the New Report from INPUT!

When you bid on federal systems integration contracts, you want a competitive edge. INPUT's new report on the *Federal Systems Integration Market, 1990-1995* has been designed from the ground up to give it to you.

To write this report, INPUT's researchers have dug up information from several sources, including: the highly regarded primary research in INPUT's Procurement Analysis Reports; the OMB/GSA/NIST Five-Year Information Technology Plans for 1990 - 1995; interviews with leading federal systems integration contractors and prime contractors of existing systems contracts; interviews with federal officials who manage these contracts; and the GFY Information Technology Budgets for federal agencies.

The research team then distilled that information into a powerful competitive weapon you can use to enhance the effectiveness of *all* of your marketing and sales activities in this market.

The report is the result of a major research effort. At the regular price, it represents an excellent value.

But if you act before February 15, 1991, you'll pay $175 less than the regular list price for the report—a savings of 10 percent!

Given the cost of your average bid, an expenditure like that looks like some of the most intelligent leverage you could possibly apply.

Federal Systems Integration Market, 1990-1995
Market Analysis and Forecast
• Overview • Market Forecast • Competition • Federal Market Issues
Agency Requirements
• Overview • Hardware Systems • System Applications • Case Studies of Systems Integration Contracts • Acquisition Plans and Preferences • Trends
Systems Integration Vendors
• Overview • Market Share • Characteristics of Vendor Respondents • Vendor Perceptions of Federal Systems Integration • Commercial vs. Federal Systems Integration • Strategies for Success
Key Opportunities
• Present and Future Programs • Recent Awards • Systems Integration Opportunities by Agency

A Strategic Overview . . .

INPUT's report offers you two kinds of information: strategic and tactical. In the first category are answers to questions like:

- How big is the market? How fast will it grow over the next five years?
- What impacts are budget constraints having on systems integration market growth, positive and negative?
- What are the agencies' requirements in systems integration?
- How can you form alliances to expand your company's capabilities?
- Who are the top 10 systems integration vendors in 1990, by announced contract awards?
- What are their strengths and weaknesses, including history in the federal market, current projects, business organization, and financials?

And many others. INPUT gives you all the information you need to put the big picture in perspective.

...And Specific Requirements

But INPUT also gives you tactical information about the specific requirements and biases of different agencies, about where the upcoming procurements actually are, and about a whole suite of questions that will have a direct bearing on your sales success:

- What acquisition methods do agencies prefer?
- What are the key selection criteria agencies use to screen vendors?
- How large is the market for 11 different types of applications?

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Dear Colleague:

We all know it. Bidding on federal systems integration contracts just keeps getting more and more expensive. To do it well, you need much more information than can be gleaned from the average RFP.

INPUT has just released a report researched and written to give you that information in a form you can apply directly to your marketing and sales efforts. Entitled *Federal Systems Integration Market, 1990-1995,* the report offers an overall statistical assessment of the market and its five-year growth horizon, together with the analysis of consultants with decades of experience on both the agency and the vendor sides of the federal market.

Where are the tactical opportunities today? Where are the growth opportunities for the future? What do agencies want? What do the various regulations require? INPUT's report answers all of these questions and many more, giving you a powerful competitive weapon in an increasingly complex and expensive market.

Why settle for less? Read the enclosed brochure, then use the order form to pick up your copy of the report today!

Regards,

John E Frank

John Frank
President, INPUT, INC.

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YES! I need a competitive advantage in bidding on federal SI procurements. I need INPUT's new report on the *Federal Systems Integration Market, 1990-1995*.

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

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Custom SI Initiatives by Agency
GFY 1990 - GFY 1995

Agency	Total
Defense	
Air Force	6
Army	12
Navy	5
Marine Corps	1
Defense Dept.	5
Subtotal	29
Civil	
Agriculture	3
Commerce	2
EPA	1
GSA	1
H&HS	2
H&UD	1
Interior	2
Justice	4
Labor	1
NASA	3
OPM	1
State	2
Transportation	2
Treasury	4
U.S. Courts	2
Veterans Affairs	1
Subtotal	32
Total	61

Source: INPUT Procurement Analysis Reports

INPUT GIVES YOU PRECISE, tactical information about which agencies are planning major custom systems integration projects between now and GFY 1995, as this table shows. Actual dollar amounts are not shown.

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- What is the balance between Department of Defense and civilian agency systems integration procurements?
- How many systems integration initiatives will be launched between 1990 and 1995 by each of five defense and 16 civilian agencies?
- What are the dollar values for each?
- What kind of role is artificial intelligence likely to play in future procurements?
- What proportion of SI programs are devoted to expansion, replacement, and new start programs for each of five defense and 16 civilian agencies?
- What are the technical factors agencies believe affect the successful completion of federal SI contracts? The nontechnical factors?

In addition, the report offers vendors: detailed and sophisticated analyses of five federal systems integration contract case studies; detailed breakdowns of systems integration markets by delivery modes, subdelivery modes, and categories; and coverage of other issues that gives you a useful context for tactical and strategic decision making.

Doing business in this market has become a very risky and expensive undertaking. To do it well, you need hard data and analysis backed up by decades of federal procurement experience. The programs are complex. The procurement processes are complex.
The information contained in the average RFP just isn't enough.

But the information contained in INPUT's new report *Federal Systems Integration Market, 1990-1995*, is. Use the enclosed form to order your copy today.

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If You Need Reliable Intelligence about the Federal Professional Services Market...

- How big is the market?
- How fast are various segments growing?
- What are agencies looking for in vendors?
- Which agencies spend the most in this market?
- Which RFP opportunities are open right now?

...You Need the Concentrated Research in INPUT's New Report!

You need information you can trust about federal professional services. And INPUT has just released a new report designed to give it to you.

The *Federal Professional Services Market, 1990-1995*, is a report that contains a distillation of extensive research into this rapidly changing market. Written by an expert staff with several decades of experience in the federal markets, the report combines their expertise with the results of INPUT's formidable research infrastructure to give you a targeted competitive weapon you can use to boost sales now.

Federal Professional Services Market, 1990-1995
Market Analysis and Forecast
• Overview • Market Forecast, 1990-1995 • Vendors of Professional Services to the Government • Market Size by Agency • Federal Market Issues
Federal User Requirements and Trends
• Significant Problems/Issues • Budget and Applications • Agency Perceptions of Professional Services • Case Studies of Professional Services Contracts • Acquisition Plans and Preferences • Projected Trends in the Use of Professional Services
Competitive Trends
• Vendor Participation • Vendor Market Perceptions • Vendor Contracting Views • Trends • Recommendations
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• Future Programs • Professional Services Opportunities by Agency

At the full price of $1,750, this comprehensive study would be a bargain.

But if you act before February 28, 1991, you'll pay $175 less than that regular list price for the report—a savings of 10 percent!

The market is changing fast. Slower growth, budget constraints, and increased competition are all acting to transform the way you'll have to do business. INPUT's report can help you turn these changes to your advantage.

Answers

The first advantage the report gives you is a penetrating analysis of the broad-scale trends sweeping this market. It was written to help you answer questions like:

- What are the professional services budgets of the top civilian and military agencies for 1990 and 1991?
- What proportion of the federal professional services market is accounted for by GOCO? By consulting services? By education and training? By software development?
- What forces are driving the growth of the GOCO market?
- How are budget constraints and dissatisfaction with contracting out various services affecting the consulting services market?
- How is the growth of commercial systems operations affecting the federal education and training market?
- How will POSIX and GOSIP change your business?
- What's happening behind the MASCs?
- What impact has slower federal budget growth had on competition?

The report also offers detailed analyses of the competitive environment you have to work in every day. Who are the top 20 vendors? What are their histories in the market? What contracts were recently awarded them? What strategies are they pursuing? The report addresses all of these issues, and more.

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Dear Colleague:

To get the greatest benefit from the money and energy you spend on federal professional services bids, you need targeted market intelligence on where the opportunities are, what the agencies require from you, and who your competition is likely to be.

INPUT's new report on the *Federal Professional Services Market, 1990-1995* is a distillation of extensive research into this fast-changing opportunity.

The report was compiled by people who have spent their entire professional careers reading federal markets, either as agency buyers or commercial vendors, or both. They have written a report that gives you:

- Detailed market forecasts
- In-depth vendor profiles
- Investigations of broad market trends
- Analyses of agency expenditures
- Analyses of agency vendor requirements
- An examination of competitive trends
- An analysis of 76 open RFPs

And much more.

Why settle for guesswork in a market this complex? INPUT has already done the work to answer your key questions.

So read the enclosed brochure, then use the order form to pick up your copy of the report today!

Regards,

John E Frank

John Frank
President, INPUT, INC.

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A Tactical Advantage

But in addition to this kind of information and analysis of large-scale trends, INPUT's report also offers you focused answers to the tactical questions that can have a tremendous short-term impact on your sales:

- What are 76 actual professional services opportunities that are open now, and what are their RFP schedules and funding levels?
- How have PCs created new professional services markets?
- Where will OMB Circular A-76 have the greatest market impact, and how can you respond?
- Which four agencies spend the most in each of the following four categories of professional services: software development, consulting services, education and training, and systems operations?
- How do key buying agencies rank the importance of eight major categories of vendor expertise?
- How do these agencies rank the disadvantages and liabilities of using professional services?
- How do defense and civilian agencies rank seven key characteristics of successful contractors?
- How do buying agencies rank five vendor selection criteria, including cost, staff experience, proposed technical solution, reputation, and project management capabilities?
- What kind of professional services contracts do various federal agencies prefer?
- What improvements do civil and defense agencies want to see in professional services vendors?

Federal Government Agency Professional Services Budgets, GFY 1990-1991

$ Millions						
Consulting, Education, and Training		Software Development		Operations and Maintenance		Agency
1990E	1991F	1990E	1991F	1990E	1991F	
75	80	301	320	255	283	Energy
347	239	334	404	66	71	GSA
53	51	440	510	421	475	NASA
14	7	424	392	414	442	Air Force
47	40	429	461	108	114	Navy
47	48	259	323	571	628	Army

E = estimated F = forecast

Plus four in-depth case studies of large professional services contracts, including: mission; tasks performed; type, value, and duration of contract; schedule; prime and subs; project components; value of each component; project scope; and original funding.

You could not possibly duplicate this research effort for any reasonable cost. But by buying the report, you can effectively put the entire project staff on your team, and put INPUT's expertise to work for you right now, giving you the edge you need in this market.

Why wait? Use the enclosed form to order your copy of INPUT's report on the *Federal Professional Services Market, 1990-1995* today.

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When You Have To Analyze Significant Systems Operations Opportunities...

- ▲ Why are companies buying and not buying?
- ▲ What do users say they want from vendors?
- ▲ What kinds of expertise do you need?
- ▲ What are your competitors doing?
- ▲ How big is the market?

You Need Market Intelligence and Analysis from INPUT!

INPUT just made it easier for you to take advantage of one of the most dynamic opportunities available in the information services business.

Systems operations has everything you could want for a strong and stable business: large contracts, long-term commitments, and robust growth. All you need to exploit its full potential—and avoid its many pitfalls—is timely, firsthand market intelligence enhanced by the analysis of some of the finest minds in the industry.

INPUT has just released a report that offers vendors exactly that. Entitled *Systems Operations Management Issues and Practices*, the report is the result of an extensive research effort focused sharply on the systems operations market, including issues such as why companies contract or don't contract, what will motivate them to consider systems operations, and how successful contracts are managed.

To understand the needs and the market, researchers discussed issues and requirements with vendors and large and small users in numerous industries. They drew upon the resources and expertise of executives that have managed operations, and executives responsible for developing information systems.

If you act before February 15, 1991, you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

The report gives you hard data and informed analysis on every aspect of the systems operations market. For people who need to evaluate the large-scale issues in the market, the report answers the following kinds of questions:

- How big is the systems operations market?
- How fast will it grow over the next five years?
- Which segments of the market are growing fastest? Slowest?
- What impact will globalization have on systems operations decisions?
- How important will telecommunications and networking expertise be in the coming market for systems operations?
- How do equipment lease/purchase decisions affect the federal systems operations market?
- What is the next major area of systems operations growth?
- Who are the five leading systems operations vendors, and what are they doing right?
- How do most vendors structure their systems operations business?
- How important are alliances to systems operations contracts?

And a host of others that will define how you address the strategic facets of your systems operations decisions.

In addition, the report gives vendors invaluable insight into exactly how user companies are evaluating systems operations and making their

Systems Operations Major Trends

- Growing Financial Constraints
- Growing Competition
- Growing Complexity of Technology
- Lack of Skilled Personnel

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decisions to either enter the market or stay out of it for now. The report gets down to a level of tactical detail that you can't find anywhere else:

- What are the major reasons users decide to contract for systems operations services?
- In what order of importance do users rate security, cost, understanding of the user's business, and the overall importance of the IS function in making the contracting decision?
- What roles do expense control and capital conservation play in contracting decisions?
- What are the most common approaches to contract pricing?
- What are users' responses to common personnel issues, and how can you prepare for them?
- How have user IS organizations hampered users' attempts to get systems operations evaluated, and how can you fight back?
- What role does ensuring the availability of information play in this decision?
- What role do geographically dispersed operations play in the systems operations decision?
- What are the multiplatform/multistandard arguments against?

Plus questions about cost issues, capital conservation, multivendor networked environments, and more. The report closes with a comprehensive set of conclusions and recommendations that crystallize the relevant data and our consultants' thinking on this complex and tempting market opportunity.

The market opportunity is tempting. But you have to have exactly the right kind of competitive intelligence to exploit it.

INPUT gives it to you. Use the enclosed form to order your copy of *Systems Operations Management Issues and Practices* today!

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When You Have To Analyze Significant Systems Operations Opportunities...

- Why are companies buying and not buying?
- What do users say they want from vendors?
- What kinds of expertise do you need?
- What are your competitors doing?
- How big is the market?

You Need Market Intelligence and Analysis from INPUT!

INPUT just made it easier for you to take advantage of one of the most dynamic opportunities available in the information services business.

Systems operations has everything you could want for a strong and stable business: large contracts, long-term commitments, and robust growth. All you need to exploit its full potential—and avoid its many pitfalls—is timely, firsthand market intelligence enhanced by the analysis of some of the finest minds in the industry.

INPUT has just released a report that offers vendors exactly that. Entitled *Systems Operations Management Issues and Practices*, the report is the result of an extensive research effort focused sharply on the systems operations market, including issues such as why companies contract or don't contract, what will motivate them to consider systems operations, and how successful contracts are managed.

To understand the needs and the market, researchers discussed issues and requirements with vendors and large and small users in numerous industries. They drew upon the resources and expertise of executives that have managed operations, and executives responsible for developing information systems.

Systems Operations Major Trends

- Growing Financial Constraints
- Growing Competition
- Growing Complexity of Technology
- Lack of Skilled Personnel

If you act before February 15, 1991, you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

The report gives you hard data and informed analysis on every aspect of the systems operations market. For people who need to evaluate the large-scale issues in the market, the report answers the following kinds of questions:

- How big is the systems operations market?
- How fast will it grow over the next five years?
- Which segments of the market are growing fastest? Slowest?
- What impact will globalization have on systems operations decisions?
- How important will telecommunications and networking expertise be in the coming market for systems operations?
- How do equipment lease/purchase decisions affect the federal systems operations market?
- What is the next major area of systems operations growth?
- Who are the five leading systems operations vendors, and what are they doing right?
- How do most vendors structure their systems operations business?
- How important are alliances to systems operations contracts?

And a host of others that will define how you address the strategic facets of your systems operations decisions.

In addition, the report gives vendors invaluable insight into exactly how user companies are evaluating systems operations and making their

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Dear Colleague:

You know how tempting the systems operations market opportunity is, with its demonstrated growth and revenue potential. Matching your company's strengths with that opportunity, however, takes careful planning and analysis based on the truth about what's happening in a very complex field.

That's what INPUT's latest report, *Systems Operations Management Issues and Practices* gives you. In six concise chapters filled with data that have been interpreted by some of the best minds in the industry, this report gives you a detailed portrait of the systems operations market opportunity.

How big is the market? What are the factors that will cause companies not contracting for systems operations today to do so in the future? INPUT's report answers these questions, and many others.

To really succeed in this complex field, you need more than technical expertise and the right service offerings. You have to know where the market is, what users say they want and need, where the demand really is, and where the unexpected pitfalls are.

Systems Operations Management Issues and Practices gives you all of this, and more. So why not put this research to work for you? Get a copy of INPUT's report today.

Regards,

John E Frank

John Frank
President, INPUT, INC.

ORDER FORM

YES! I have to have competitive intelligence about the systems operations markets. I need INPUT's report on *Systems Operations Management Issues and Practices.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

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decisions to either enter the market or stay out of it for now. The report gets down to a level of tactical detail that you can't find anywhere else:

- What are the major reasons users decide to contract for systems operations services?
- In what order of importance do users rate security, cost, understanding of the user's business, and the overall importance of the IS function in making the contracting decision?
- What roles do expense control and capital conservation play in contracting decisions?
- What are the most common approaches to contract pricing?
- What are users' responses to common personnel issues, and how can you prepare for them?
- How have user IS organizations hampered users' attempts to get systems operations evaluated, and how can you fight back?
- What role does ensuring the availability of information play in this decision?
- What role do geographically dispersed operations play in the systems operations decision?
- What are the multiplatform/multistandard arguments against?

Plus questions about cost issues, capital conservation, multivendor networked environments, and more. The report closes with a comprehensive set of conclusions and recommendations that crystallize the relevant data and our consultants' thinking on this complex and tempting market opportunity.

The market opportunity is tempting. But you have to have exactly the right kind of competitive intelligence to exploit it.

INPUT gives it to you. Use the enclosed form to order your copy of *Systems Operations Management Issues and Practices* today!

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Systems Operations Management Issues and Practices
Market Overview
• Systems Operations Forecast • Systems Operations Options • Systems Operations Vendors • Market Forces and Issues
User Issues
• Buying Practices • Contract Types • Personnel Issues • Vendor Relations • Trends and Benefits
Vendor Practices
• Organization • Marketing and Sales • Contract Types • Personnel Issues • Customer Relations • Major Trends
Conclusions and Recommendations

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If You Want To Know Exactly How New Technologies Are Making It in the Real World...

- What are the issues in RDBMS implementation?
- How important are CASE tools in today's IS operations?
- What role is AI playing in IS these days?
- What are user objectives for data center management?
- How effective are the various kinds of networking technology?

. . . You'll Need INPUT's New Report on New Technology Implementation!

When new technologies are first introduced, they often sound like they'll do everything but cure the common cold. How they actually perform in the real world, however—the world of IS departments with real challenges in applications development and data center management to meet—is usually another story.

That's the story INPUT's new report on *Managing Information Technology in the 1990s* gives you. The report is the result of a months-long effort by a team of researchers with experience as both users and vendors of new technology and is designed to give you the truth behind the sometimes inflated claims made for untested technologies.

Managing Information Technology in the 1990s
Technology Issues
• Implementation Inhibitors • General Management vs. IS Management • Implementation Effectiveness
Image Processing, CASE, Applications Development, Data Center Management
• Status • Issues • Effectiveness
Recommendations

The report would be a bargain at full price. But INPUT wants to offer you an even better deal.

Buy the report before January 31, 1991, and you'll pay $250 less than the regular list price for the report—a savings of 10 percent!

INPUT's research team knows which questions to ask to uncover the truth about how these technologies are actually being used. And that kind of information can give your company a significant competitive advantage.

The Key Technologies

From a list of hundreds of technologies, INPUT chose the ones that offer the most potential to change the way IS departments operate:

- Artificial intelligence/expert systems
- CASE tools
- Cooperative processing
- Distributed data base management systems
- Imaging
- Networking (LANs, WANs, MANs)
- Object-oriented programming systems
- Relational data base management systems
- SAA
- UNIX and open systems
- Data center operations

These are the developments we keep hearing about. But we rarely hear about how they work in the world *you* work in every day.

How Are They Really Used?

For each of these promising new technologies, INPUT's report determines to what degree their promise has been realized:

- Is interest in CASE really waning?
- How fast is distributed data base management technology being adopted?

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Dear Colleague:

Sure they all sound good when they're introduced, but how are highly touted new technologies actually performing in the real world?

INPUT has put together an entire report devoted to this issue. Entitled *Managing Information Technology in the 1990s,* it offers you a rare glimpse of how emerging technologies are faring in the marketplace. In the report, our experts set out the results of a research protocol designed to highlight exactly how such promising new technologies as networking, distributed processing, CASE tools, image processing, data center operations, and others are being implemented and evaluated by companies relying on them to work—and work well.

This is not a popularity contest. INPUT's research team has taken pains to go beyond the relatively simple questions about how well things work to examine how companies are dealing with all of the issues that come along with making significant changes in any system. What you get in the report is a fully drawn portrait of these technologies and their actual impacts on actual IS departments.

The technologies are analyzed not in the light of their own data sheets, but in the context of the larger strategic goals of the organization using them. And the report offers clear and concise recommendations—based on research data and the analysis of industry experts—on all the myriad questions concerning new technologies.

So why not put those data and researchers on your team? Why don't you use the enclosed order form to order your copy of *Managing Information Technology in the 1990s* today?

Regards,

Doug Tayler

Doug Tayler
Director of Research

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YES! I want to know how new technologies are actually being used in the real world. I want INPUT's *Managing Information Technology in the 1990s.*

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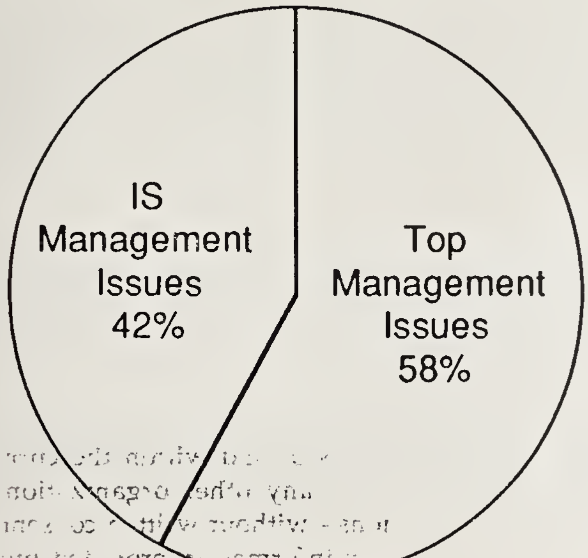
Top Management vs. IS Management Inhibitors



- Who is driving the implementation of UNIX and open systems technology? How active is the typical IS organization in this effort? How do they rate its effectiveness, and why?
- What are the major trends in imaging? In what kinds of applications is it being used today? What are organizations' future plans for imaging technology?
- How are LAN, WAN, and MAN technologies being used today? What are organizations' plans for them in the future?
- How do IS managers rate the effectiveness of networking technology in their businesses?
- How are IS departments incorporating artificial intelligence and expert systems into their technology mix?
- What new ideas for meeting the maintenance challenge have been proposed? How has IS reacted?
- What are the ultimate objectives of the IS organization for data center management?

More than just a popularity profile, this evaluation focuses on the central issues governing the acceptance of any new product or practice. How effective is it? How well does it help management solve the problems it was designed to solve? What are the inevitable issues accompanying its implementation that must be addressed?

These issues will probably play a central role in determining the ultimate effectiveness of the new technologies, so INPUT devotes much research energy to addressing them. In applications development, for example, the report ranks the five issues users find critical. INPUT then asks IS managers to quantify the time they spend developing new applications versus maintaining old ones. Within this context, the report goes on to analyze the major strategies IS is now using to address a crucial problem: the control and allocation of maintenance resources.

This kind of in-depth analysis is typical of the entire report. *Managing Information Technology in the 1990s* doesn't just give you facile generalizations. It gives you detailed, informed examinations of exactly how new technologies are faring in the real world.

This is the kind of in-depth, behind-the-scenes information that can make a tremendous difference to both user and vendor companies trying to evaluate how new technologies might actually fit into *their* world.

So get the best factual data and most penetrating analysis of new technology available. Use the enclosed form to order your copy of INPUT's report on *Managing Information Technology in the 1990s* today.

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What's Going On in the Processing Services Market?

Modest Growth.

Intense Competition.

- ▲ How big is it, and how will it grow over five years?
- ▲ How are new architectures and cheap MIPS affecting it?
- ▲ How are the big players diversifying?
- ▲ How interested should I be in disaster recovery services?
- ▲ Where will the new growth opportunities be?

How Do You Succeed? Read INPUT's New Report

When a market shows only modest growth, like the processing services market, the companies that succeed usually have something their competitors don't.

They have specific intelligence on what trends are shaping the market, where the market is going, and where the best opportunities are for companies that are alert and agile enough to exploit them.

INPUT has just released a new report to give you this intelligence *now*, when changes in the market could very well dictate substantial changes in your product, marketing, and sales strategies.

Entitled *U.S. Processing Services Market, 1990-1995*, the report offers detailed five-year market projections by delivery mode and by vertical industry. It is a comprehensive analysis of a market offering considerable revenue and profit opportunities.

And if you act before May 7, 1991, you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

What's happening in processing services? Why has it offered several large companies dependable margins over the long haul? INPUT's report answers these questions and more.

Sweeping Trends

The processing services market is in the grip significant forces that are changing how the game is played. INPUT examines these forces, answering questions like:

- How big is the market today, and how fast will it grow for the next five years?
- How will outsourcing affect market growth and your business in the future?
- What impacts will the recession have on the overall market for processing services?
- How can you best prepare for the downturn?
- What large-scale impacts will improvements in client/server architectures and dollars/MIPS ratios have on processing services?
- Which submarkets have the best promise for short-term growth? For sustained long-term growth?

INPUT's experts have watched the processing services market grow for decades. This report puts their combined expertise to work for you in analyzing these sweeping trends.

Report Contents

General Business Climate

- General Economic Climate
- Information Services Industry Issues and Climate
- Processing Services Business Issues and Trends

Market Forecast

- Processing Services Overview
- Driving Forces
- Submode Market Forecasts

Issues and Trends

- Transaction Processing Services
- Utility Processing Services
- Other Processing Services

Competition

- Market Leaders
- Competitive Issues
- Segment Leaders
- Vendor Profiles

Conclusions and Recommendations

- Processing Services Overview
- Transaction Processing Services
- Utility Processing Services
- Other Processing Services

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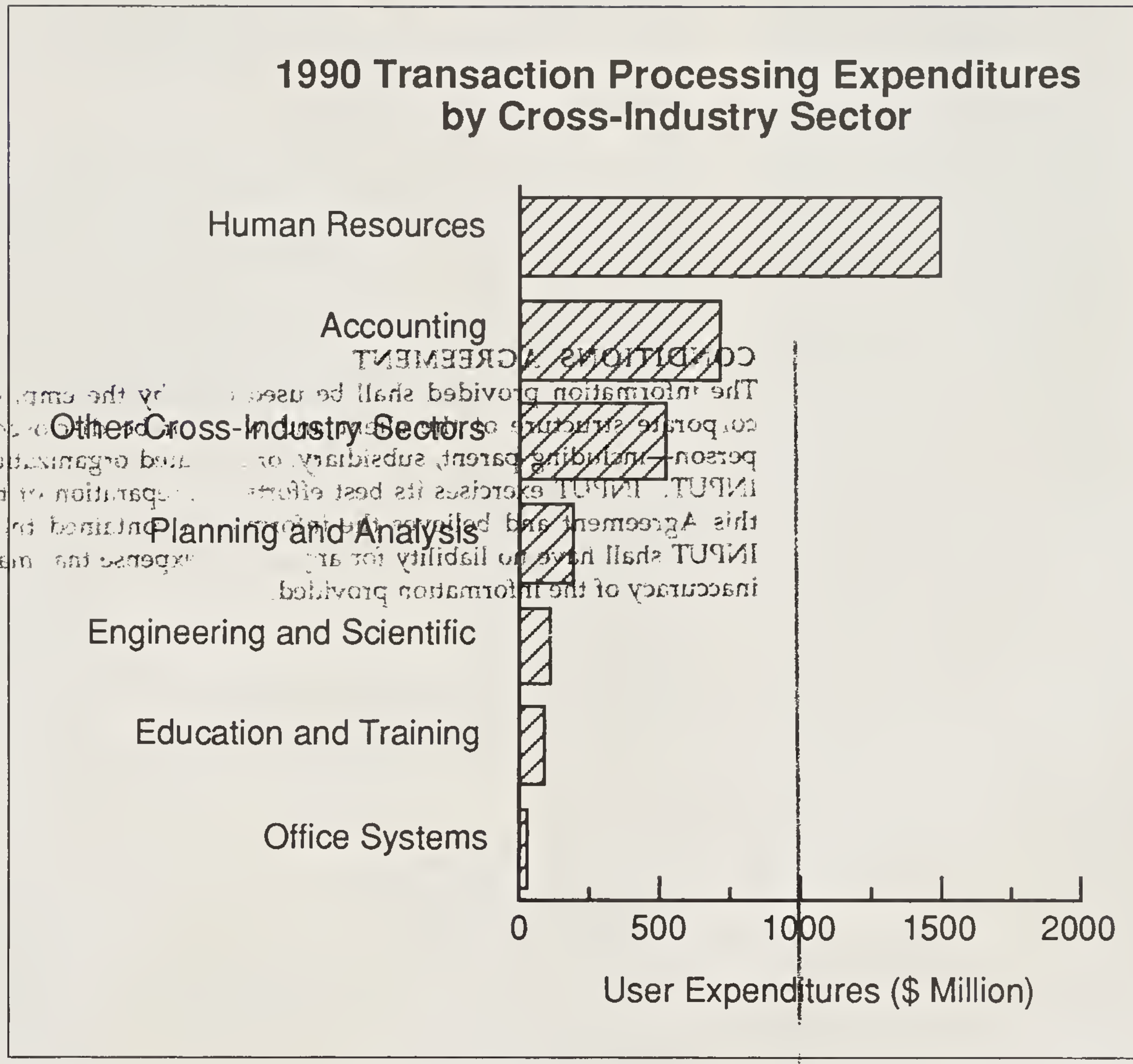
Ramifications

But that's not all. In addition, INPUT's report, *U.S. Processing Services Market, 1990-1995* delves into the specific dynamics of much smaller changes whose ramifications could still have a tremendous impact on your business:

- Who are the leading processing services vendors, and what are they doing right?
- How important is systems operations to these vendors, measured in dollars?
- Who are the leading vendors in utility processing services? In specialized niche markets?
- How are large vendors offering their clients an expanding mix of service offerings?
- Who are the dominant competitors in disaster recovery services?
- What is the opportunity in this area?
- What are the long-term prospects for computer-output microfilm (COM) services?



WHERE DOES THE MONEY GO? The report tracks expenditures in several different ways, including yearly outlays by cross-industry sector.

And more on the specific questions you must answer to stay ahead of the curve in a market whose growth might be modest, but whose changes are likely to be significant in the short term.

The money is there to be made, but it takes excellent market intelligence to figure out how to invest your resources to get the highest possible return.

INPUT's *U.S. Processing Services Market, 1990-1995* gives you that market intelligence now, ahead of the curve, when it will have the greatest impact on your business.

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Kanda Sakuma-cho, Chiyoda-ku
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